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automotive FLEET

CAR AND LIGHT TRUCK FLEET AND LEASING MANAGEMENT MAGAZINE

Containing Maintenance Costs

Managing Your Lessor
Creating Policy For Small Fleets

1991 Fleet Buying Survey
Using Auctions To Your Advantage

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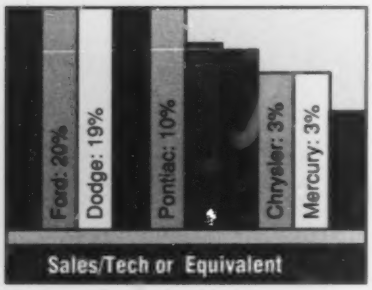
CAR AND LIGHT TRUCK FLEET AND LEASING MANAGEMENT MAGAZINE

November 1990
VOL. 30, NO. 1

Influencing the management of 4,952,000 cars and 2,070,000 light trucks and vans in business, leasing, rental, utility, government, police, and taxi fleets.



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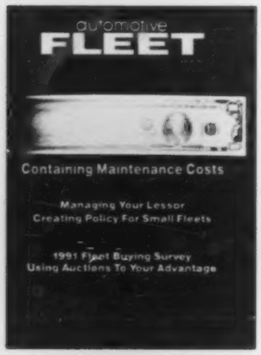

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FLEET

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On the cover: Are maintenance expenses accelerating? One method to minimize this expense is highlighted in a story that begins on page 43.

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Survey Reveals Stability In '91 Buying Market

At this point in the model year, it appears that 1991-model commercial fleet purchases will be as strong or stronger than those in 1990, according to Automotive Fleet's *recent 1991-Model Buying Survey.*

Manufacturers Appearing on Selector Lists

■ EXECUTIVE SELECTOR LIST	
▲ GENERAL MOTORS	65%
▲ CHRYSLER	9%
▲ FORD MOTOR CO.	20%
▲ OTHER	6%

■ REGIONAL MANAGER SELECTOR LIST	
▲ GENERAL MOTORS	59.5%
▲ CHRYSLER	16%
▲ FORD MOTOR CO.	23%
▲ OTHER	1.5%

■ DISTRICT MANAGER SELECTOR LIST	
▲ GENERAL MOTORS	58%
▲ CHRYSLER	18%
▲ FORD MOTOR CO.	16%
▲ OTHER	8%

■ SALES/TECHNICAL SERVICES SELECTOR LIST	
▲ GENERAL MOTORS	49%
▲ CHRYSLER	27%
▲ FORD MOTOR CO.	23%
▲ OTHER	1%

■ MISCELLANEOUS	
▲ GENERAL MOTORS	30%
▲ CHRYSLER	30%
▲ FORD MOTOR CO.	40%

Recently, *Automotive Fleet* surveyed the nation's Top 200 fleets to determine their current and future purchases for the 1991-model year. The results are promising for auto manufacturers.

Survey questions centered on projected fleet buying patterns for cars currently appearing on their selectors, the total number of cars currently in their fleets, and how many purchases they plan to make in the 1991-model year.

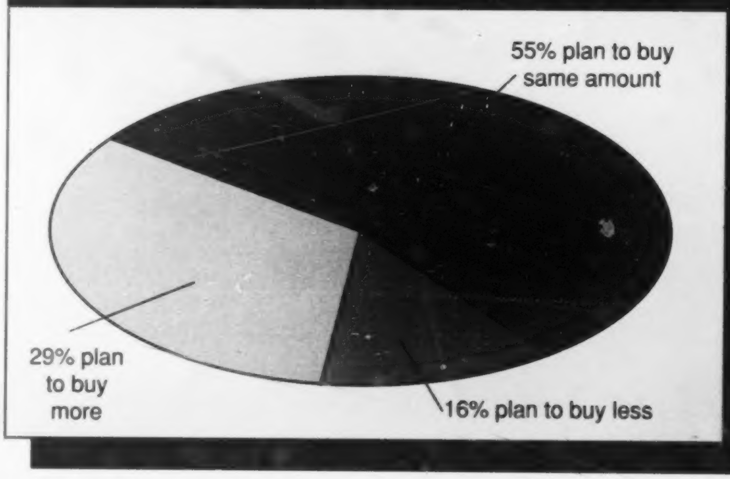
Out of the 200 questionnaires mailed, 68 were returned, yielding a 34 percent response rate. Fleet size of the responding companies ranged from the relatively small (less than 300 vehicles) to larger fleets consisting of more than 15,000 units. In all, more than 173,742 vehicles were represented, with the respondents saying that they planned to buy 65,702 new vehicles during the 1991-model year.

When asked whether they planned to buy more, less, or the same number of new vehicles in 1991 as they had in 1990, 55 percent said that they planned to buy the same number of vehicles, 29 percent said that they planned to buy more, and 16 percent of the respondents said that they planned to buy fewer vehicles. These figures correspond with the buying trends demonstrated in the 1990 Vehicle Acquisition Survey conducted by the National Association of Fleet Administrators (*Automotive Fleet*, January 1990), and also confirm the views of *Automotive News*, which conducted a survey among the fleets of seven major corporations. According to that survey, given the uncertainties in the economy and the oil supply from the Middle East, some fleets may still reassess their buying plans, but heading into 1991, it appears that it could remain pretty much business as usual as far as fleets are concerned.

This is also a good sign for domestic automakers, who may be counting on fleet sales to stabilize an otherwise chaotic new-car and truck market in 1991.

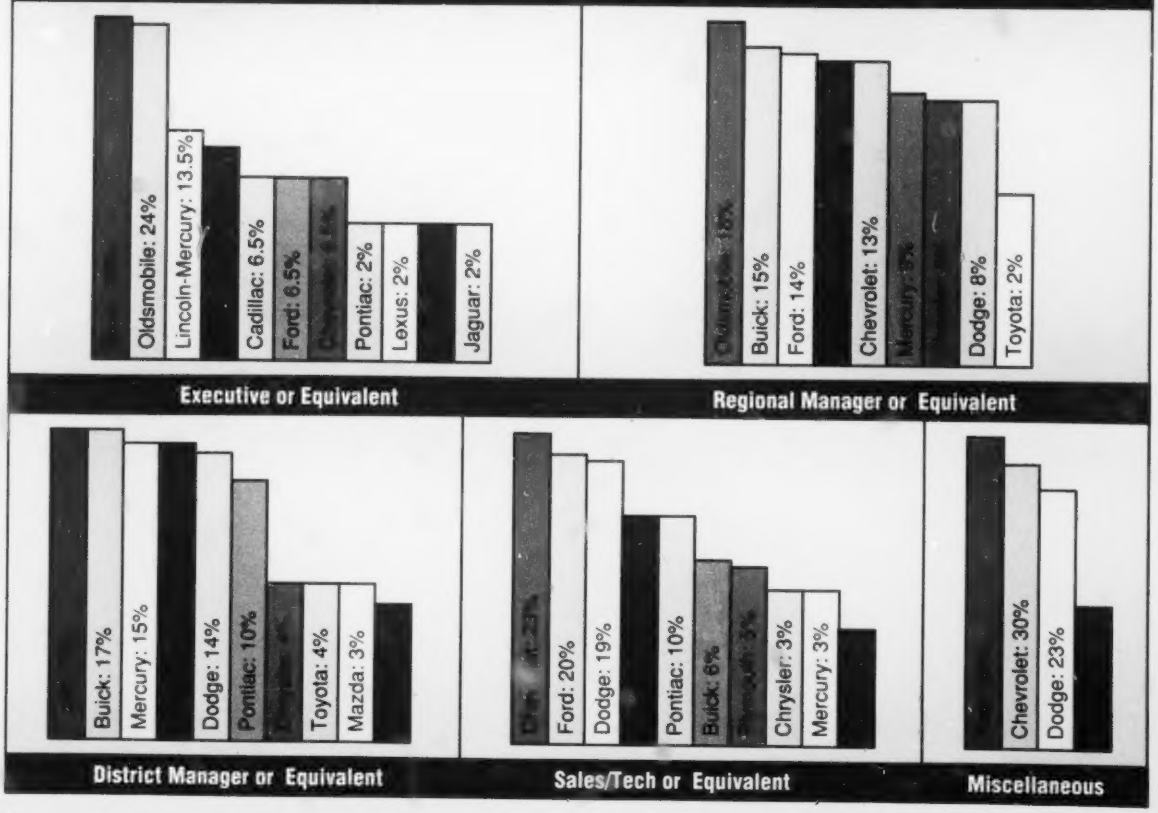
According to *Fortune* magazine, the Big Three automakers sold fully 29 percent of their three million cars that were produced in the first half of 1990 to fleets, up from the 27 percent recorded in the first half of 1989. "In some cases, we make more from fleet sales than dealer sales," says Joel Pitcoff, manager of research and analysis for Ford. As an example, almost half of all Lincolns are sold to fleets.

How Fleets Will Buy in 1991 Compared to 1990



Although imports and transplants are making small inroads into the fleet market, they still have a long way to go. The majority of fleets are attracted to domestics because of the greater variety of full-sized intermediates that they offer. As the imports continue to increase the size of their

Vehicle Nameplate By Job Category

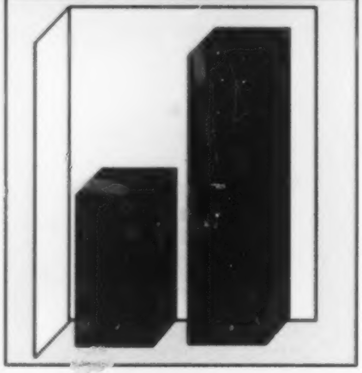


cars, however, increased competition for the fleet market could easily be seen in the future.

But for now, General Motors' vehicles are receiving the lion's share of fleet business, according to the AF survey respondents, with GM nameplates appearing on 47 percent of the vehicles currently in service in those fleets. Ford/Lincoln-Mercury are second with 28 percent of the business, Chrysler third with 23 percent, and all other makes combined receiving two percent.

These figures correlate to some degree with the results of the 1990-model fleet market share by manufacturer results of the NAFA survey. In that study, fleet managers said that 39 percent of their 1990-model year purchases would be General Motors' vehicles, 31 percent Ford/Lincoln Mercury, 29 percent Chrysler, and one percent all other makes combined.

Do You Use An Outside Purchasing Service?



The selection criteria that companies use for their fleets seems little changed from 1990, a good sign considering that the changing business enviroment will most likely focus on leanness and competitiveness in the coming years, which could cause fleet downsizing.

As Tim Hoffmann, manager of employee transportation and travel services for 3M Corp. in St. Paul, MN, points out, "If I have a stable replacement cycle that makes economic sense to our fleet, we'll stay with that cycle unless there's a severe recession in the economy.

"Deferring purchases has a way of catching up to you. It's like not paying your Visa bill. Ultimately, it's still there." The 3M Corp. has no stated policy on which makes of vehicles it purchases.

"We don't buy a vehicle because of the brand, we buy a vehicle to meet our functional needs," says Hoffmann. Last year, the company offered it's employees a choice between the Dodge Dynasty, Ford Taurus, and a Buick Century Custom Sedan. In 1991, 3M plans to offer the Ford Taurus, Chevrolet Lumina, and the Plymouth Acclaim. AF

Sample Selector List from a Surveyed Fleet

Regional Manager (or equivalent):		
Buick Regal, Ltd.,	2 door,	Plus $400 toward equipment
Buick Century Ltd.,	4 door,	Plus $400 toward equipment
Dodge Dynasty LE,	4 door,	Plus $300 toward equipment
Ford Thunderbird,	2 door,	Plus $400 toward equipment
Ford Taurus LX,	4 door,	Plus $200 toward equipment
Mercury Cougar,	2 door,	Plus $500 toward equipment
Mercury Sable LS,	4 door,	Plus $400 toward equipment
Oldsmobile Cutlass Ciera SL,	4 door,	Plus $300 toward equipment
Oldsmobile Cutlass Supreme SL,	2/4 door,	Plus $200 toward equipment
Pontiac Grand Prix LE,	2/4 door,	Plus $500 toward equipment
Pontiac 6000 LE,	4 door,	Plus $600 toward equipment

NOTE: Executive levels receive same vehicles as regional managers, but with additional $200 towards optional equipment.

District Manager (or equivalent)		
Buick LeSabre Ltd.,	2/4 door,	Plus $400 toward equipment
Ford Crown Victoria,	4 door,	Plus $400 toward equipment
Mercury Grand Marquis GS,	4 door,	Plus $400 toward equipment
Oldsmobile 88 Royale Brougham,	4 door,	Plus $400 toward equipment
Pontiac Bonneville LE,	4 door,	Plus $400 toward equipment
Sales Representatives (or equivalent):		
Buick Regal,	2 door	
Buick Century Custom,	4 door	
Dodge Dynasty,	4 door	
Ford Taurus GL,	4 door	
Mercury Cougar,	2 door	
Mercury Sable GS,	4 door	
Oldsmobile Cutlass Ciera,	4 door	
Pontiac Grand Prix LE,	2/4 door	
Pontiac 6000 LE,	4 door	

NOTE: Vehicles include stereo with cassette for all levels.

What You Should Know About Auto Auctions

Following some simple guidelines and asking a few questions can maximize the auction experience for fleet managers and help increase fleet resale prices. Here is a primer that even seasoned auction attendees can use.

If possible, attend sales at auction locations you are considering using. An auction can do your fleet more harm than good if you are unfamiliar with the process.

Many avenues exist for remarketing fleet vehicles, each with varying profit levels. One fleet remarketing alternative that continues to grow in popularity is the auto auction. What follows are some practical ways to maximize profits through auction remarketing. These tips on maximizing efficiencies are useful not only for fleet managers who have never set foot on an auction site, but for frequent users as well.

Fleet and auction industry members agree that the most successful fleet managers are those who carefully prepare for the remarketing process. Here's a checklist to follow to help ensure that your company will get the most from auction remarketing decisions.

1 *Attend Auction Sales.*

First, find out what the auction industry is all about. This is best accomplished by attending a few sales. Personal visits help the fleet manager to:

- Understand auctions' selling atmosphere. Excitement levels, arena set-up, people, and sound volume are some of the things that make auctions unique places to remarket used vehicles. Being comfortable in this environment can be used to your advantage.
- Recognize selling trends. Attending auctions gives a feel for buying patterns. By knowing the patterns, the selling strength of fleet vehicles can be determined. For example, what is the demand for luxury versus intermediate cars in your market?

2 *Learn How Auctions Are Staffed.*

An auction is only as good as the people who staff it. A fleet entrusts millions of dollars in product to auction managers and their staffs. "Fleet managers will get more from an auction if the personnel understand their motivations, interests and business," says Jay Fahrendorff, assistant vice president of used-vehicle marketing for Associates Leasing, Inc.

Here is a list of the key auction people who can make life easier and help increase the bottom line:

General Manager: As the auction's senior executive, the general manager oversees all auction activities. They can provide a broad market perspective. They also take great interest in making sure their entire staff is meeting their users' needs.

Fleet Manager: This person is sometimes referred to as the fleet/lease or institutional manager. The fleet manager's job is to coordinate all facets of the auction (check-in and condition report writing, reconditioning, detailing, lot/sale set-up, etc.) so that a fleet's vehicles bring the most money under current market conditions. They can help price vehicles for sale and will represent cars if someone from the company is unable to attend the auction.

Operations Manager: As overall coordinator of activities, operations managers fit fleet vehicles, and everything that must be done with them, into the auction flow.

The operations manager's responsibilities often overlap the fleet manager's. Their general objective is ensuring that vehicles are ready for sale when promised and available for inspection by prospective buyers prior to sale.

Fleet History At Auctions

During the past few decades, auctions have distinguished themselves as a force in used-vehicle remarketing. In 1960, one million cars were remarketed through auctions. This year, auctions will remarket 10 million cars with an estimated value of more than $50 billion. The annual growth rate for auctions from 1980-1989 was 15 percent.

In a recent address to the Automotive Fleet & Leasing Association, Stephen McNeely, CEO and president of GE Capital Auto Auctions, noted that, "Not only has the size of the auction business recently exploded, but the business mix has also changed. This is due in large part to greater auction use by fleet companies. Five years ago, dealer consignments accounted for 75 percent of auction vehicles. Today, institutional cars from fleet lessors, manufacturers, banks, and finance companies make up more than half of auctions' remarketing volume."

As Figure 1 on page 64 indicates, the percentage of auction vehicles sourced from institutions has doubled during the past five years.

Reconditioning Manager: Do not underestimate the role the recon manager can have in improving a fleet's remarketing effectiveness. Along with the fleet manager, the recon manager can advise which repairs should be completed and which are not worth the investment.

Title & Registration Manager: As computerized as most auctions are today, there is still a fair amount of paperwork to complete. State and

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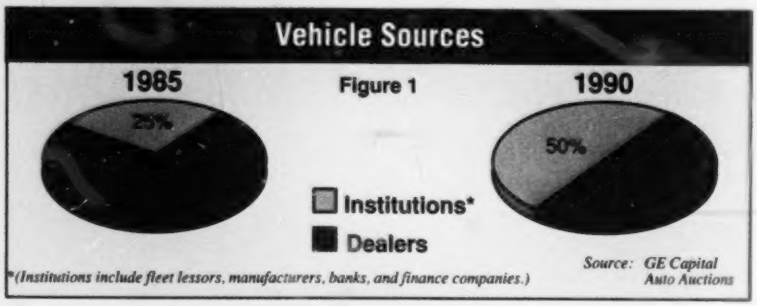

Figure 1

*(Institutions include fleet lessors, manufacturers, banks, and finance companies.)

Source: GE Capital Auto Auctions

federal regulations are the source of most paperwork, so it cannot be ignored. Establishing a good relationship with these experts pays off later in more efficient processing and fewer rejected sales from missing or incomplete documentation.

Experienced remarketers suggest fleet managers work with auction personnel to control their vehicles from pickup to the final moment of sale. "You should leave nothing to chance when remarketing vehicles," says Frank Grochal, vice president of used vehicles for ARI.

3 *Have all important vehicle information available.*

Simplify the logistics of auctioning by preparing before sale day. Local and national regulations require certain documents and information in order to process cars. The things you should do before going to auction include:

- Identifying the units in the fleet that are available for sale.
- Knowing the exact locations of these vehicles, especially if they are not on-site (such as at lessee's residence, dealership, etc.).
- Having a contact person at the vehicle location who can release the car to the pickup agent.
- Having a current odometer statement (now a federal law).
- Signing a power-of-attorney statement for the auction to act as the company's agent on certain matters relating to remarketing your cars.

Check with the auction prior to bringing in vehicles about your particular state's requirements for any additional documents.

Selecting An Auto Auction

Once the homework is complete, the next step is to select a remarketing location. Getting to know the people is a natural part of the process. Besides overall comfort with the staff, consider these additional characteristics when selecting a site:

1 *Marketing Knowledge.*

A fleet manager needs an auction staff that is in tune with the resale market and familiar with local

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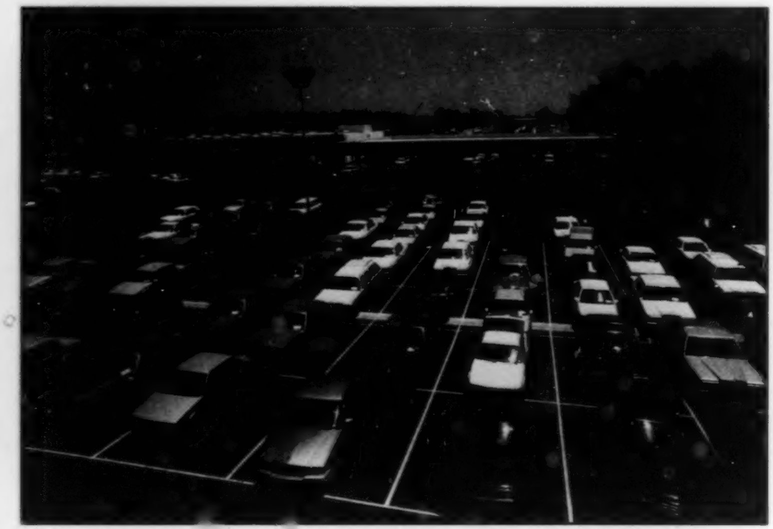

Pre-sale inspection and prepping are one of many services offered by auctions.

and regional market trends. "Auction personnel are your eyes, ears, and brain in their respective marketplaces. Fleet managers should rely on that expertise and insight," says Fahrendorff, who has remarketed 65 percent of Associates Leasing Inc.'s used fleet cars through auctions during the past 12 months.

Auction staffs can tell how the market is reacting to current events. "Even if we do not have current inventory for sale at a facility, we contact our auction representative on a weekly basis to keep abreast of the market and just to stay in touch," says Grochal.

2 *Reconditioning Facilities.* Investing in reconditioning can increase the resale value of fleet vehicles. Earlier this year, one manufacturer tested this assertion by running a number of late-model used vehicles through an auction to see what price these cars would bring at wholesale before and after reconditioning. In every case reconditioning added value to the unit, with a net profit of $52 on a 1986 model with high mileage to $428 on a 1989 model with low mileage (See Figure 2, page 68). The return on reconditioning investments averaged 44 percent.

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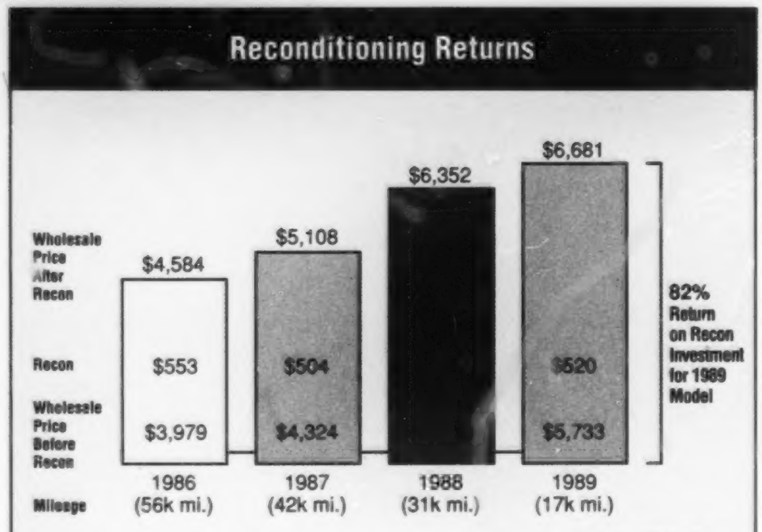

Source: GE Capital Auto Auctions

Figure 2

3 *High Resale Price Track Record.*
Study auction prices monthly or even weekly to determine if comparable vehicles sold at a given auction are bringing prices consistent with local market strength.

Auctions print their sales results in a monthly (and sometimes weekly) market report available through the auction.

4 *Location and Reach.*
Most national auction chains have weekly sales in the larger markets and offer pickup and drop-off at the auction.

Auctions can even redirect vehicle models to other locations where prices are stronger for a particular mix of cars.

5 *Cost-effective Marketing.*
Many auctions, especially the larger ones, support fleet sales with direct-mail marketing to prospective buyers and other promotions to encourage greater attendance and livelier bidding.

Ask if such services are available.

6 *Customer Service.*
Customer service is now a way of life for most auto auctions. Auction personnel should deliver top-level service from check-in to check-out and beyond.

7 *Full Service Capabilities.*
Select auctions that can convert the remarketing process into a "turnkey" operation. They should be able to meet all needs, ranging from vehicle pickup, condition reports, reconditioning, on-site storage, through to the final sale and settlement.

Be wary of auctions that say they reduce cost by not offering services that can be handled more inexpensively by the seller such as title registrations. These extra details can be time consuming and often result in headaches and frustration, and should be included in the services of any well-run auction.

Fleet managers already invest significant efforts in acquisition decisions. By directing efforts into the disposal process as well, higher resale can be translated into lower depreciation costs.

One method to accomplish this is by using an auctions' wide range of services. Familiarity with auctions and careful evaluation of these remarketing locations will ensure maximize return on a fleet's disposal. AF

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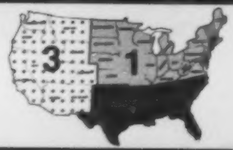
USED-CAR PRICES

The following are average used-car prices for the period ending October 1, 1990. Prices are based on wholesale activity at major dealers across the country. They are divided into three zones as indicated on the accompanying map. These averages are calculated electronically. They are based on clean cars only. Proper allowance should be made for upgrading sharp cars and proper deduction taken for fair cars. Automatic transmissions have been included in the averages of all models. This information is published in *Automotive Fleet* by special permission of *Automotive Market Report*.



89 BUICK SKYHAWK			
Coupe	6,294	6,360	6,171
Sedan	6,382	6,446	6,254
88 BUICK SKYHAWK			
Coupe	5,229	5,279	5,123
Sedan	5,302	5,353	5,198
89 BUICK SKYLARK			
Cust Sedan	7,357	7,428	7,208
88 BUICK SKYLARK			
Cust Sedan	6,235	6,300	6,114
89 BUICK CENTURY			
Cust Sedan	7,662	7,739	7,508
88 BUICK CENTURY			
Cust Sedan	6,174	6,238	6,053
89 BUICK LESABRE			
Cust Sedan	9,931	10,031	9,732
88 BUICK LESABRE			
Cust Sedan	8,193	8,275	8,030
89 CADILLAC DEVILLE			
Coupe	16,704	16,874	16,371
Sedan	16,886	17,054	16,551
88 CADILLAC DEVILLE			
Coupe	13,245	13,376	12,980
Sedan	13,400	13,534	13,130
89 CADILLAC SEVILLE			
Sedan	17,178	17,351	16,836
88 CADILLAC SEVILLE			
Sedan	14,176	14,320	13,893
89 CHEVY BERETTA			
Coupe	7,373	7,449	7,230
89 CHEVY CORSICA			
Htchbk 4 Dr.	7,025	7,098	6,886
88 CHEVY BERETTA			
Coupe	6,100	6,162	5,981
88 CHEVY CORSICA			
Sedan	5,643	5,704	5,537
89 CHEVY CAVALIER			
Sedan	5,993	6,054	5,875
88 CHEVY CAVALIER			
Sedan	5,012	5,065	4,914
89 CHEVY CELEBRITY			
Sedan	7,114	7,185	6,972
88 CHEVY CELEBRITY			
Sedan	5,708	5,765	5,594
89 CHEVY CAPRICE			
Sedan	8,038	8,119	7,876
88 CHEVY CAPRICE			
Sedan	6,513	6,578	6,383
89 CHRYSLER LEBARON			
Highline Sedan	7,090	7,165	6,951
88 CHRYSLER LEBARON			
Sedan	5,648	5,706	5,536
89 CHRYSLER NEW YORKER			
Sedan	11,303	11,416	11,077
88 CHRYSLER NEW YORKER			
Sedan	9,551	9,647	9,362
89 CHRYSLER FIFTH AVENUE			
Sedan	11,456	11,573	11,228
88 CHRYSLER FIFTH AVENUE			
Sedan	9,359	9,454	9,174
89 DODGE ARIES AMERICA			
Sedan	5,715	5,776	5,602
88 DODGE ARIES AMERICA			
Sedan	4,583	4,626	4,492
89 DODGE SHADOW			
Liftbk 5 Dr	6,030	6,091	5,909
88 DODGE SHADOW			
Liftbk 5 Dr	4,924	4,973	4,827
89 DODGE DYNASTY			
Sedan	8,588	8,674	8,416
89 FORD ESCORT			
Htchbk 4 Dr LX	5,180	5,229	5,075
88 FORD ESCORT			
Htchbk 4 Dr GL	4,091	4,132	4,007
89 FORD MUSTANG			
LX-4 Coupe	6,887	6,959	6,750
88 FORD MUSTANG			
LX-4 Coupe	5,721	5,779	5,605
89 FORD TEMPO			
GL Sedan 4 Dr	6,150	6,211	6,027
88 FORD TEMPO			
GL Sedan 4 Dr	5,080	5,131	4,978
89 FORD TAURUS			
GL Sedan 4 Dr	8,141	8,223	7,979
88 FORD TAURUS			
GL Sedan 4 Dr	6,552	6,618	6,424
89 FORD CROWN VICTORIA			
Sedan	10,643	10,754	10,430
88 FORD CROWN VICTORIA			
Sedan	8,731	8,817	8,556
89 THUNDERBIRD			
Coupe	9,629	9,723	9,435
88 THUNDERBIRD			
Coupe	7,838	7,917	7,681
89 LINCOLN			
Town Car Sedan	15,354	15,507	15,047
Continental Sedan	17,222	17,396	16,879
88 LINCOLN			
Town Car Sedan	12,980	13,112	12,721
Continental Sedan	15,073	15,222	14,772
89 MAZDA 626			
LX Sedan 4 Dr	9,414	9,509	9,226
89 MERCURY COUGAR			
LS Coupe	10,135	10,238	9,932
88 MERCURY COUGAR			
LS Coupe	8,328	8,412	8,160
89 MERCURY TOPAZ			
GS Sedan 4 Dr	6,302	6,365	6,177
88 MERCURY TOPAZ			
GS Sedan 4 Dr	5,163	5,212	5,058
89 MERCURY SABLE			
GS Sedan 4 Dr	8,180	8,265	8,019
88 MERCURY SABLE			
GS Sedan	6,687	6,750	6,550
89 MERCURY GRAND MARQUIS			
GS Sedan	11,204	11,320	10,981
88 MERCURY GRAND MARQUIS			
GS Sedan	9,349	9,441	9,161
89 MITSUBISHI MIRAGE			
Sedan 4 Dr	5,451	5,505	5,342
88 MITSUBISHI MIRAGE			
Sedan	4,128	4,171	4,046
89 NISSAN SENTRA			
Sedan 2 Dr	4,902	4,951	4,804
89 NISSAN STANZA			
E Ntch 4 Dr	8,162	8,246	8,000
89 NISSAN MAXIMA			
SE Sedan	13,457	13,593	13,189
88 NISSAN SENTRA			
Sedan 2 Dr	4,046	4,087	3,965
88 NISSAN STANZA			
E Ntch 4 Dr	6,613	6,679	6,481
88 NISSAN MAXIMA			
SE Sedan	10,384	10,487	10,175
89 OLDS CIERA			
Coupe	7,578	7,655	7,427
Sedan	7,662	7,739	7,508
88 OLDS CIERA			
Coupe	6,109	6,171	5,987
Sedan	6,174	6,238	6,053
89 OLDS CALAIS			
Sedan	6,744	6,812	6,608
88 OLDS CALAIS			
Sedan	6,205	6,264	6,079
89 OLDS CUTLASS SUPREME			
Coupe	8,200	8,283	8,037
88 OLDS CUTLASS SUPREME			
Coupe	7,221	7,297	7,080
89 OLDS 98 REGENCY			
Sedan	12,229	12,350	11,982
88 OLDS 98 REGENCY			
Sedan	9,804	9,901	9,606
89 PLYMOUTH RELIANT			
Sedan	5,689	5,745	5,574
88 PLYMOUTH RELIANT			
Sedan	4,607	4,651	4,518
89 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	6,030	6,091	5,909
88 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	4,920	4,969	4,823
89 PLYMOUTH GRAN FURY			
Salon Sedan	5,892	5,954	5,775
88 PLYMOUTH GRAN FURY			
Salon Sedan	4,837	4,886	4,739
89 ACCLAIM			
Sedan	6,835	6,903	6,700
89 PONTIAC SUNBIRD			
LE Sedan	6,255	6,317	6,130
SE Coupe	6,171	6,232	6,047
88 PONTIAC SUNBIRD			
SE Coupe	5,222	5,276	5,116
SE Sedan	5,293	5,343	5,187
89 PONTIAC 6000			
LE Sedan	7,349	7,422	7,201
88 PONTIAC 6000			
Coupe	5,818	5,877	5,704
Sedan	5,884	5,942	5,764
89 PONTIAC GRAND AM			
LE Sedan	7,404	7,477	7,253
88 PONTIAC GRAND AM			
Sedan	6,217	6,278	6,090
89 PONTIAC BONNEVILLE			
LE Sedan	9,592	9,688	9,401
88 PONTIAC BONNEVILLE			
LE Sedan	8,223	8,306	8,059
89 PONTIAC GRAND PRIX			
Coupe	8,392	8,475	8,222
88 PONTIAC GRAND PRIX			
Coupe	7,443	7,518	7,301
89 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	7,235	7,307	7,090
89 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	9,472	9,566	9,283
89 TOYOTA CRESSIDA			
Lux Sedan	14,764	14,910	14,469
88 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	6,068	6,129	5,947
88 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	8,029	8,109	7,870
88 TOYOTA CRESSIDA			
Lux Sedan	12,303	12,424	12,0[illegible]7
89 VOLKSWAGEN JETTA			
Sedan 4 Dr	7,853	7,931	7,695
88 VOLKSWAGEN JETTA			
Sedan 4 Dr	6,455	6,520	6,326
89 VOLVO			
240 DL Sedan	12,911	13,040	12,653
88 VOLVO			
240 DL Sedan	11,127	11,237	10,905

GAS PRICES

STATEMENT OF OWNERSHIP, MANAGEMENT AND CIRCULATION

I certify that the statements made by me above are correct and complete

UNLEADED GAS
Cost Per Gallon

City	Full-Serve	Self-Serve
Anchorage, AK	173.1¢	142.7¢
Birmingham, AL	152.4	128.2
Phoenix, AZ	158.9	128.4
Redding, CA	179.4	145.9
Denver, CO	169.5	141.5
Washington, D.C.	162.9	137.2
Orlando, FL	157.2	138.2
Maui, HI	198.9	158.2
Worcester, MA	148.4	121.9
Charlotte, NC	158.4	138.9
Albuquerque, NM	140.6	125.9
Poughkeepsie, NY	171.4	144.4
Nashville, TN	165.7	137.6
Houston, TX	165.0	130.5
Milwaukee, WI	156.5	136.2

The average U.S. full-serve gasoline price for the month of October was 155.8 cents per gallon.
The average U.S. self-serve gasoline price for the month of October was 138.7 cents per gallon.
Survey conducted during the first five working days of October 1990.
Supplied by Runzheimer International, Runzheimer Park, Rochester, WI.

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December 1990

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SPECIAL SECTION

Top 100 Truck Fleets

Truck Specs

Upfitting Showcase

Truck Statistics

Dos and Don'ts for Van Safety

Specing A Truck

automotive
FLEET®

CAR AND LIGHT TRUCK FLEET AND LEASING MANAGEMENT MAGAZINE

December 1990
VOL. 30, NO. 2

Influencing the management of
4,952,000 cars and 2,070,000 light trucks
and vans in business, leasing, rental,
utility, government, police, and taxi fleets.

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On the cover: Pictured is Chevrolet's lineup of 1991 commercial trucks and vans. For a complete preview of what's available industry-wide in the 1991 truck market, see page 32.

AUTOMOTIVE FLEET (ISSN 0005-1519) is published monthly except April, by Bobit Publishing Company, 2512 Artesia Blvd., Redondo Beach, California 90278. The contents of this publication may not be reproduced either in whole or in part without consent of Bobit Publishing. Please address ALL correspondence to the Editorial and Executive Offices at 2512 Artesia Boulevard, Redondo Beach, California 90278. Subscription Prices – United States: $24 per year, $40 for two years; Canadian $32 per year, $60 for two years. Single copy price – $2.00; Fact Book – $35. Number of cars operated and services must accompany the order. Second Class postage paid at Redondo Beach, California 90277-9998 and at additional mailing offices. POSTMASTER: Send address changes to Automotive Fleet, 2512 Artesia Boulevard, Redondo Beach, California 90278. Bobit Publishing also publishes *Auto Rental News, Bedroom, Business Driver, Installation News, Fleet Financials, Limousine & Chauffeur, Metro, Contemporary Surgery, Contemporary Orthopaedics, School Bus Fleet, Security Sales, Sound Challenge, Canadian Automotive Fleet, Canadian Business Driver, Nails, Nail Tech News, and Showcase USA.*

U.S. Light and Medium Truck Statistics

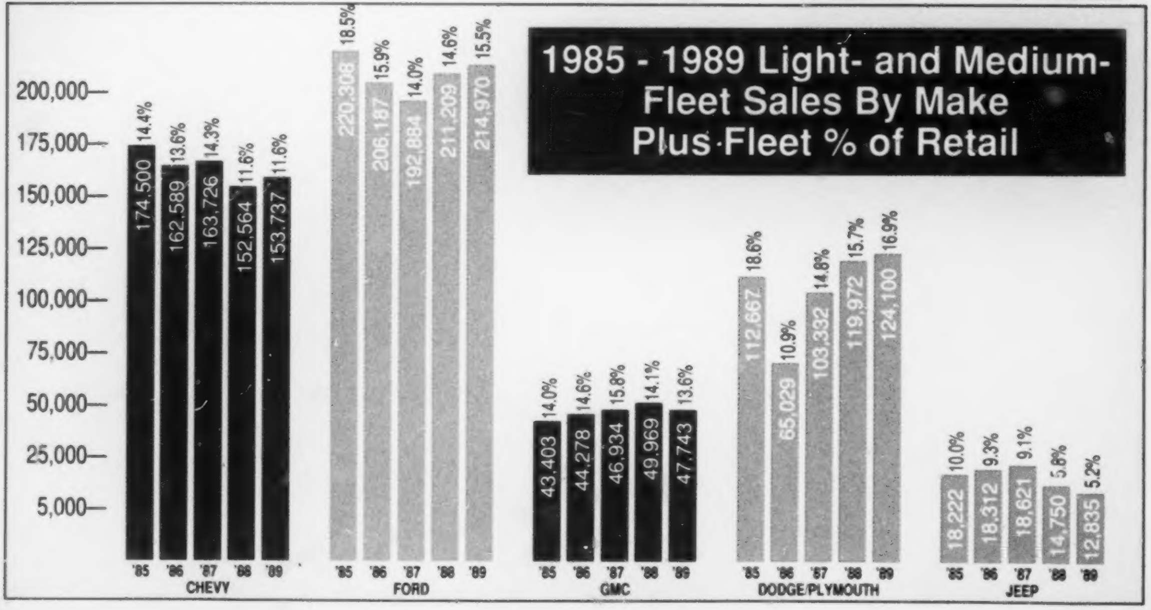
New 1981 to 1990 Classes 1 - 5 Truck Sales/Registrations Reported. National and Fleet Totals by Calendar Year.

Source: Automotive Fleet Research Dept.

MAKE	1981*	1982*	1983*	1984*	1985*	1986*	1987*	1988*	1989	8 mos. YTD 1990
CHEVY	619,997	726,358	891,125	1,072,231	1,209,012	1,198,856	1,145,472	1,314,657	1,323,305	840,473
	94,289	97,514	90,686	133,969	174,500	162,589	163,726	152,564	153,737	98,090
	15.2%	13.4%	10.2%	12.5%	14.4%	13.6%	14.3%	11.6%	11.6%	11.7%
FORD	648,804	689,941	905,846	1,111,832	1,189,053	1,296,181	1,376,037	1,443,060	1,388,760	922,180
	116,979	101,471	106,263,	142,163	220,308	206,187	192,884	211,209	214,970	147,480
	18.0%	14.7%	11.7%	12.8%	18.5%	15.9%	14.0%	14.6%	15.5%	16.0%
GMC	128,615	186,257	224,718	268,858	309,125	304,133	296,435	354,282	350,039	225,407
	21,531	23,772	23,244	37,685	43,403	44,278	46,934	49,969	47,743	27,384
	16.7%	12.8%	10.3%	14.0%	14.0%	14.6%	15.8%	14.1%	13.6%	12.1%
DODGE & PLYMOUTH	181,308	228,232	263,687	503,967	606,388	596,159	697,773	763,309	735,184	502,138
	29,930	29,078	28,491	53,727	112,677	65,029	103,332	119,972	124,100	84,093
	16.5%	12.7%	10.8%	10.7%	18.6%	10.9%	14.8%	15.7%	16.9%	16.7%
JEEP	58,257	62,097	76,453	148,040	181,939	195,973	203,625	253,454	249,170	153,459
	3,246	3,816	1,947	5,971	18,222	18,312	18,621	14,750	12,835	5,519
	5.6%	6.1%	2.5%	4.0%	10.0%	9.3%	9.1%	5.8%	5.2%	3.6%
DOMESTIC TOTAL	1,636,981	1,892,885	2,361,829	3,104,928	3,495,517	3,591,302	3,719,342	4,128,762	4,046,458	2,643,657
	265,975	255,651	250,633	373,515	569,110	496,395	525,497	548,464	553,385	362,566
	16%	14%	11%	12%	16%	14%	14%	13%	14%	14%
IMPORT TOTAL	276,820	310,809	414,951	611,346	782,795	881,725	700,703	622,401	568,397	380,438
	15,597	26,558	43,382	77,563	99,201	108,249	49,788	49,835	49,379	30,630
	6%	9%	10%	13%	13%	12%	7%	8%	8%	8%
INDUSTRY TOTAL	1,913,801	2,203,694	2,776,780	3,716,274	4,278,312	4,473,027	4,420,045	4,751,163	4,614,855	3,024,095
	281,572	282,209	294,015	451,078	668,311	604,644	575,285	598,299	602,764	393,196
	15%	13%	11%	12%	16%	14%	13%	13%	13%	13%

* Light-Duty Truck Registrations Only.

Total | Fleet | % Fleet



1985 - 1989 Light- and Medium-Fleet Sales By Make Plus Fleet % of Retail

Import Light and Medium Truck Market Statistics

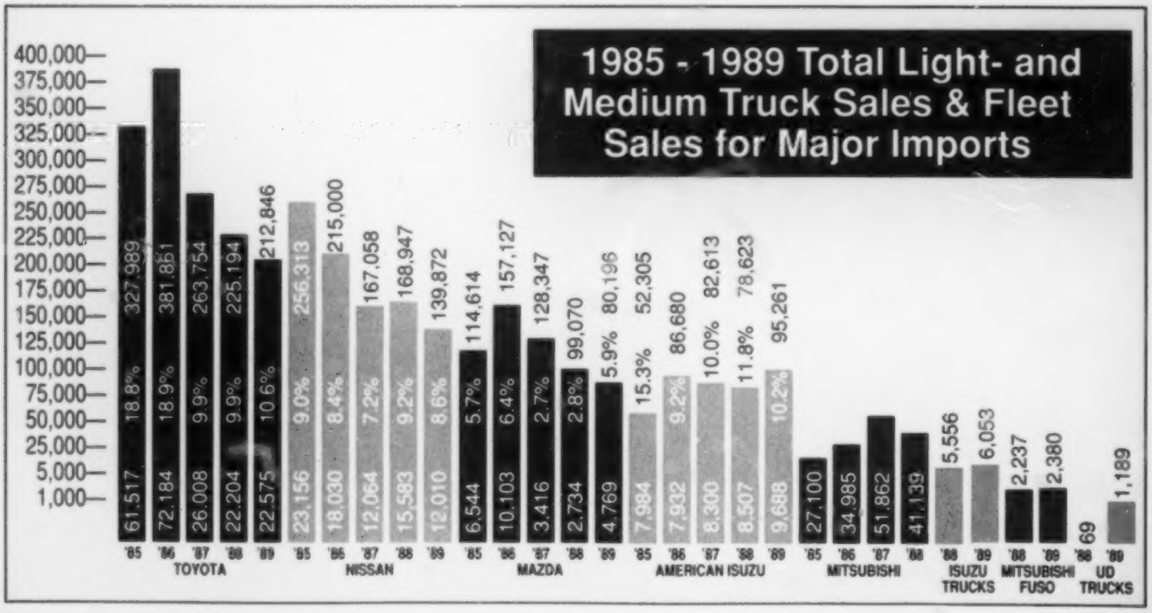
New 1981 to 1990 Classes 1-5 Truck Sales/Registrations Reported. National and Fleet Totals by Calendar Year.

Source: Automotive Fleet Research Dept.

MAKE	1981*	1982*	1983*	1984*	1985*	1986*	1987*	1988*	1989	8 mos. YTD 1990
TOYOTA	130,379	143,439	170,000	244,072	327,989	381,861	263,754	225,194	212,846	120,597
	9,413	10,906	23,367	41,860	61,517	72,184	26,008	22,204	22,575	[illegible]
	7.2%	7.6%	13.8%	17.2%	18.8%	18.9%	9.9%	9.9%	10.6%	8.7%
NISSAN	119,684	106,440	132,088	194,414	256,313	215,000	167,058	168,947	139,872	112,554
	6,184	13,430	12,073	19,401	23,156	18,030	12,064	15,583	12,010	[illegible]
	5.5%	12.6%	9.1%	10.0%	9.0%	8.4%	7.2%	9.2%	8.6%	8.5%
MAZDA	16,798	40,661	75,751	118,368	114,614	157,127	128,347	99,070	80,196	54,675
		2,182	5,747	6,610	6,544	10,103	3,416	2,734	4,769	[illegible]
		5.3%	7.5%	5.6%	5.7%	6.4%	2.7%	2.8%	5.9%	5.9%
AMERICAN	9,959	17,669	26,211	37,443	52,305	86,680	82,613	78,623	95,261	62,213
ISUZU			2,175	9,602	7,984	7,932	8,300	8,507	9,688	[illegible]
			8.3%	25.6%	15.3%	9.2%	10.0%	11.8%	10.2%	11.4%
MITSUBISHI		931	9,222	14,943	27,100	34,985	51,862	41,139	29,189	21,873
								807	337	240
								2.0%	1.2%	1.1%
IVECO		1,669	1,679	2,106	1,948	1,411	1,268	1,556	1,411	678
ISUZU TRUCK					2,526	4,661	4,825	5,566	6,053	5,298
MITSUBISHI FUSO							976	2,237	2,380	1,545
UD TRUCKS - NISSAN DIESEL AMERICA								69	1,189	1,005
IMPORT	276,820	310,809	414,951	611,346	782,795	881,725	700,703	622,401	568,397	380,438
TOTAL	15,597	26,558	43,362	77,563	99,201	108,249	49,788	49,835	49,379	[illegible]
	6%	9%	10%	13%	13%	12%	7%	8%	8%	8%

* Light-Duty Truck Registrations Only

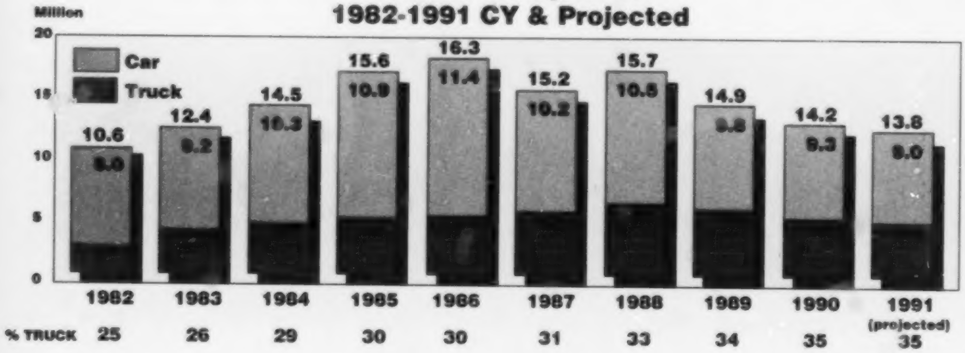
Total ▭ Fleet ▨ % Fleet ▭



1985 - 1989 Total Light- and Medium Truck Sales & Fleet Sales for Major Imports

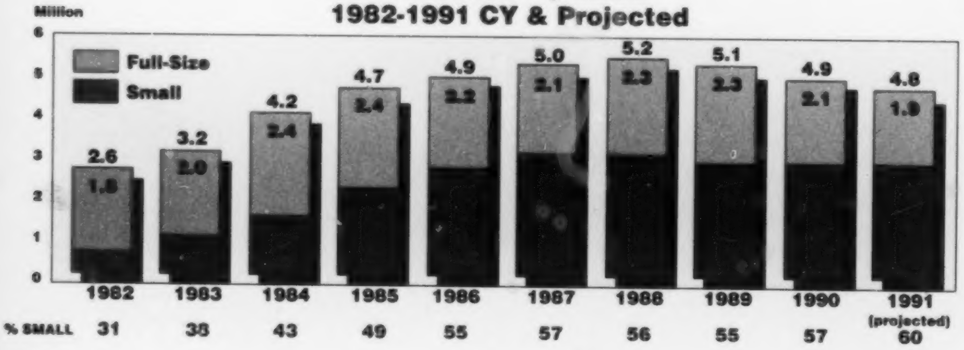
U.S. Light Truck Statistics

Total Industry Sales
1982-1991 CY & Projected



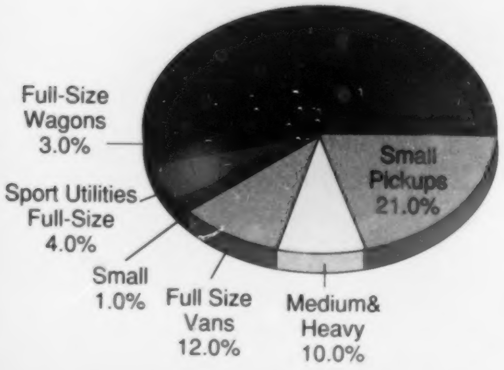
Trucks sales have been on the increase since 1982–going from 2.6 million and only 25 percent of the industry to the all-time industry record in 1988, with decreases in 1989 to 1990 which are expected to continue in 1991.

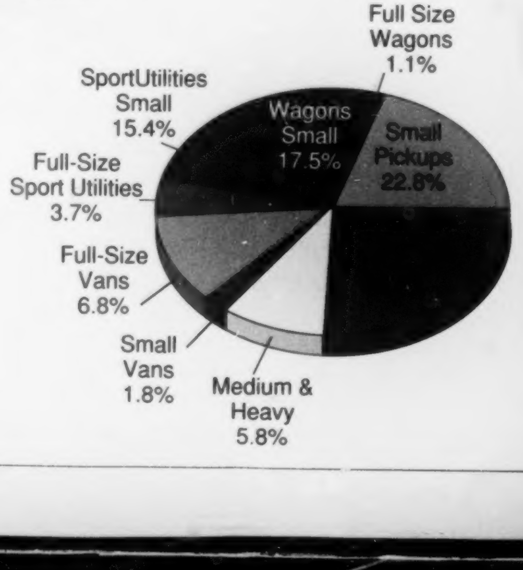
Total Industry Sales
1982-1991 CY & Projected



In 1982, only 800,000 small trucks were sold for 31 percent of the market. In contrast, 1990 saw 2.8 million small trucks sold for 57 percent of the market. These 2.8 million small trucks were more than the entire truck market in 1982.

1981 CY Truck Market 1990 CY
Total Registrations





Top 50 Utility Truck & Van Fleets

	CO. NAME & LOC.	FLEET CONTACT	# TRKS & VANS
1.	BellSouth Atlanta, GA	Stuart Colman	28,530
2.	GTE Dallas, TX	Cliff Hayden	28,065
3.	US West, Inc. Denver, CO	Scott Madsen	16,844
4.	Pacific Bell San Ramon, CA	M.H. Oxford	16,000
5.	New York Telephone Brooklyn, NY	Carl Monheit	8,300
6.	Contel Atlanta, GA	George Weimer Susan Doyle	6,354
7.	GTE Florida Tampa, FL	Doug Carr	5,111
8.	SoCal Edison Co. Pomona, CA	D.N. Smith	3,995
9.	Consolidated Edison New York, NY	Joe Schiavone	3,600
10.	S. New England Telecom. New Haven, CT	Ed Bouvier	3,578
11.	American Electric Pwr. Svc. Columbus, OH	Richard Stage Kevin Dinan	3,480
12.	Duke Power Co. Charlotte, NC	Ray Hall	3,210
13.	Dept. of Water & Power City of Los Angeles, CA	Charles DeVore	3,128
14.	Georgia Power Co. Atlanta, GA	Dave Wheelus	3,100
15.	General Public Utilities Parsippany, NJ	James Williams	3,000
16.	Alabama Power Co. Birmingham, AL	Ron Allums	2,931
17.	Carolina Telephone Co. Tarboro, NC	H. C. Davis	2,700
18.	Virginia Power Norfolk, VA	John Kirkland	2,549
19.	Bell Telephone of PA Norristown, PA	T. A. Laffert	2,500
20.	Consumers Power Co. Jackson, MI	Mark Brennan	2,500
21.	Southwestern Bell Tel. St. Louis, MO	Gary Pitts	2,300
22.	Houston Lighting & Power Houston, TX	Richard Grasshoff	2,200
23.	Niagara Mohawk Power Corp. Syracuse, NY	John Young	1,896
24.	Columbia Gas Disi. Columbus, OH	Tim Webber	1,877
25.	New England Tel. Co. Springfield, MA	Thomas Glasheen	1,800
26.	Florida Power & Light Co. St. Petersburg, FL	George Lindemeyer	1,685
27.	Amerigas Sacramento, CA	Jim Stevens	1,451
28.	Public Service of CO Denver, CO	Gerry Venard	1,414
29.	Union Electric Co. St. Louis, MO	Walt Caesar	1,400
30.	Arizona Public Service Phoenix, AZ	Doug McClymont	1,376
31.	Northern Indiana Public Service Co., Gary, IN	John Graun	1,316
32.	Centerior Energy Independence, OH	Jack Sedio Tom Allen	1,296
33.	Long Island Lighting Co. Hicksville, NY	John Shopis	1,245
34.	Atlanta Gas Light Co. Atlanta, GA	Lee Redman	1,218
35.	Philadelphia Electric Co. Berwyn, PA	Mark McMalley	1,175
36.	Wisconsin Power & Light Madison, WI	Randall Converse	1,162
37.	Florida Power Corp. St. Petersburg, FL	Gary Bulmer	1,148
38.	Jersey Central Power & Light Morristown, NJ	Virginia Redding	1,118
39.	Commonwealth Edison Maywood, IL	Rex Jenkins	1,028
40.	Gulf States Utilities Co. Beaumont, TX	Rose Holstead	1,024
41.	Northern States Power Co. Minneapolis, MN	Arnie Mach	1,011
42.	Cincinnati Gas & Electric Co. Cincinnati, OH	Paul Hoeting	987
43.	Pacific Power & Light Co. Portland, OR	Bill Goble	960
44.	Northeast Utilities Hartford, CT	H.E. Ruenhorst	930
45.	Appalachian Power Co. Roanoke, VA	Wayne Jacobs	925
46.	NY State Electric & Gas Binghamton, NY	Stephen Barkwell	900
47.	Michigan Consolidated Detroit, MI	Larry Alexander	895
48.	ARKLA Gas Co. Shreveport, LA	Joe Lions	850
49.	Oklahoma Gas & Electric Oklahoma City, OK	Quinn Bennett	764
50.	Illinois Power Co. Decatur, IL	F.L. Bunch	727

Chrysler Fleet Operations

Presents the 2nd Annual

automotive FLEET

ay, Inc. Tupperware Digital Equipment Honeywell Pepsi Cola Minnesota Mining and Manufacturing Standard Oil Co. (Inc.) Church of Jesus Christ er Day Saints Ashland Oil Co. State Farm Insurance Westinghouse Borg Warner Corp. Shaklee Corp. Tenneco, Inc. ARA Services Dow Chemical nion Carbide Corp./United Technologies Exxon Dresser Industries Goodyear Nabisco Shell Motorola Rollins Inc. IC Industries W.R. Grace & Co. n Kodak Federal Express Corp. Burlington Northern Control Data Corp./Commercial Credit U.S. Steel General Electric Johnson Controls, Inc. Teledyne, illips Petroleum Co. Purolator Services, Inc. Aetna Life & Casualty Proctor & Gamble Co. Revlon Inc. Canteen Corp. Gulf Oil Corp. N.L. Industries,

TOP 100

TRUCK AND VAN FLEETS

(Classes 1-5)

The 2nd Annual Top 100

Commercial/Utility/Rental Truck & Van Fleets

(Includes Classes I-V)

'90 Rank	'89 Rank	Company & Headquarters	Fleet Contact(s)	Co. Owned	Lessor(s)	#Trucks &Vans
1	1	United Parcel Service Greenwich, CT	Don Parkinson	X	—	63,000
2	2	U-Haul Phoenix, AZ	Harry DeShong	X	—	40,000
3	—	BellSouth Atlanta, GA	Stuart Colman	X	—	28,530
4	4	GTE Dallas, TX	Cliff Hayden	X	—	28,065
5	5	Federal Express Corp. Memphis, TN	Jim Gwinner	X	Fleetmark, ARI	24,316
6	6	Quality Bakers America Greenwich, CT	David I. Armstrong	X	—	17,800
7	—	US West, Inc. Englewood, CO	Scott Madsen	X	—	16,844
8	—	Pacific Bell San Ramon, CA	M.H. Oxford	X	—	16,000
9	7	Sears, Roebuck and Co. Chicago, IL	William Jones III	X	—	13,800
10	8	Frito Lay, Inc. Dallas, TX	Tom Smith	X	—	11,000
11	3	Penske Truck Leasing Reading, PA	Vincent W. Hartnett	X	—	9,173
*12	9	Continental Baking Co. St. Louis, MO	Paul Walsh J.L. Eber	X	—	8,788
13	—	New York Telephone Brooklyn, NY	Carl Monheit	X	—	8,300

*Based on last reported figures.

STATISTICS

'90 Rank	'89 Rank	Company & Headquarters	Fleet Contact(s)	Co. Owned	Lessor(s)	#Trucks &Vans
14	10	Tupperware Home Parties Orlando, FL	John Bandy Jim Metcalf	X	GEC Fleet, Wheels	7,000
15	85	Airborne Freight Corp. Seattle, WA	Martin Langley	X	—	6,500
16	—	Contel Atlanta, GA	George Weimer Susan Doyle	X	—	6,354
17	11	Chesapeake & Potomac Silverspring, MD	James Boles	X	—	6,142
18	26	Borden Columbus, OH	Al Botbyl (Dairy) Bill Talmadge (Packaging) Frank Smepak (Snacks) Jim Pryor (Groceries)	X	Bank Amerilease Beafinser Ryder Truck Rental	6,085
19	13	ARA Services Philadephia, PA	Ralph Jamic Kamran Partow	X	GEC Fleet	5,712
20	14	Interstate Brands Corp. Kansas City, MO	Gary Pasche	X	—	5,413
21	—	GTE Florida Tampa, FL	Doug Carr	X	—	5,111
22	17	Xerox Corp. Rochester, NY	Ron Pink	—	LMV	4,910
23	—	Chemlawn Columbus, OH	Ken Cheverko	X	BLC Truck Leasing Triathalon	4,848
24	21	Union Pacific Railroad Omaha, NE	Tom Lake	X	GEC Fleet	4,546
25	23	Shell Oil Co. Houston, TX	Larry Leverett Kalon Turner	X	—	4,400
26	19	Rollins Inc. Atlanta, GA	John Willis	—	B&M World Omni	4,345
27	16	Campbell Taggart, Inc. Dallas, TX	Ray Grzywinski	X	—	4,200
28	20	Philip Morris USA New York, NY	Gregory Tarring Janice Groele	—	PH&H GEC Fleet	4,100
29	—	So. Cal. Edison Pomona, CA	D.N. Smith	X	—	3,995
30	25	VPSI Detroit, MI	Stephen D. Grafe	X	—	3,930

*Based on last reported figures.

'90 Rank	'89 Rank	Company & Headquarters	Fleet Contact(s)	Co. Owned	Lessor(s)	#Trucks &Vans
31	36	Amoco Corp. Chicago, IL	Richard Lynch	X	—	3,600
[illegible]	27	Consolidated Edison New York, NY	**Joe Schiavone**	X	—	3,600
33	—	Southern New England Telecommunications Corp. New Haven, CT	Ed Bouvier	X	—	3,578
[illegible]	25	Texaco Inc. White Plains, NY	**Art Fritz**	—	PH&H	3,575
35	30	Ashland Oil Inc. Ashland, KY	William D. Bloss Steve Stewart	X	BLC Corp.	3,533
[illegible]	[illegible]	CSX Transportation Jacksonville, FL	**Jim Fronckoski** **Mark Gast**	X	—	3,530
37	12	Emery Worldwide Palo Alto, CA	Dean Wright, Jr.	X	Penske Truck Leasing	3,500
[illegible]	[illegible]	American Elec. Power Service Corp. Columbus, OH	**Richard Stage** **Kevin Dinan**	—	BLC Corp.	3,480
*39	29	Service America Corp. Stamford, CT	Wilbur O. Wachter	X	Wheels PH&H	3,439
[illegible]	[illegible]	Centel Corp. Chicago, IL	**Bill Kintigh**	X	—	3,309
41	34	Exxon U.S.A. Houston, TX	John W. Dewees	X	—	3,300
[illegible]	[illegible]	Duke Power Co. Charlotte, NC	**Ray Hall**	X	—	3,210
43	40	TW Services Spartanburg, SC	Helen Cook	X	ARI	3,150
[illegible]	[illegible]	Dept. of Water & Power City of Los Angeles Los Angeles, CA	**Charles DeVore**	X	—	3,128
45	33	ConRail Philadelphia, PA	Paul Rossi	X	—	3,100
[illegible]	32	Georgia Power Co. Atlanta, GA	**Dave Wheelus**	X	—	3,100

STATISTICS

'90 Rank	'89 Rank	Company & Headquarters	Fleet Contact(s)	Co. Owned	Lessor(s)	#Trucks &Vans
[illegible]	[illegible]	GE Consumer Service Louisville, KY	Phil Schelling	X	GEC Fleet	3,018
48	50	Entemann Bakery, Inc. Bay Shore, NY	Gene Bianco	X	—	3,010
[illegible]	[illegible]	[illegible] Services [illegible], CA	Merritt Kinne	X	GEC Fleet	3,000
50	—	General Public Utilities Parsippany, NJ	James Williams	X	—	3,000
[illegible]	[illegible]	Siemens Corp. Iselin, NJ	John Connelly	—	ARI	3,000
52	35	Tenneco, Inc. Houston, TX	Tiny Robertson	X	—	3,000
[illegible]	[illegible]	Terminix Int'l. Memphis, TN	Andy Gunnell	—	Wheels	3,000
54	64	Alabama Power Co. Birmingham, AL	Ron Allums	X	—	2,931
[illegible]	[illegible]	Phillips Petroleum Bartlesville, OK	James I. Grillot	X	—	2,926
56	43	ADT Security Systems Parsippany, NJ	John Africano	X	GEC Fleet	2,900
[illegible]	[illegible]	Johnson Controls Milwaukee, WI	Bob Borchert	X	GEC Fleet Wheels Southgate	2,830
58	71	Suburban Propane/Petrolane Long Beach, CA	Wally Evart	X	—	2,800
[illegible]	[illegible]	Burlington Northern RR St. Paul, MN	John Long	X	—	2,700
60	—	Carolina Telephone Co. Tarboro, NC	H.C. Davis	X	—	2,700
[illegible]	[illegible]	United Artists Denver, CO	Fran Spenser	X	—	2,650
62	41	Honeywell, Inc. Minneapolis, MN	Gary Anderson	—	GEC Fleet PH&H	2,582
[illegible]	[illegible]	[illegible]	John Kirkland	X	—	2,549

*Based on last reported figures.

STATISTICS

'90 Rank	'89 Rank	Company & Headquarters	Fleet Contact(s)	Co. Owned	Lessor(s)	#Trucks &Vans
64	—	Bell Telephone of PA Norristown, PA	T.A. Laffert	X	—	2,500
[illegible]	[illegible]	Consumers Power Co. Jackson, MI	**Mark Brennan**	X	—	2,500
66	15	Goodyear Tire & Rubber Akron, OH	George Platis	X	PH&H	2,500
[illegible]	[illegible]	Westinghouse Elec. Corp. Pittsburgh, PA	**Lou Dobak**	X	PH&H LMV	2,500
68	45	Norfolk Southern Roanoke, VA	Sam Hammett	X	—	2,491
[illegible]	[illegible]	Service Corp. Int'l. Stamford, CT	**Allen Bellatoni**	X	Wheels PH&H	2,490
70	53	Dow Chemical USA Midland, MI	Tom Madden Sue Soper	—	McCullagh Wheels	2,414
[illegible]	[illegible]	Atchison Topeka Santa Fe RR Chicago, IL	**Joan Williams**	X	GEC Fleet	2,400
72	47	R.J. Reynolds Tobacco Co. Winston-Salem, NC	Robert McGee	—	PH&H	2,397
[illegible]	[illegible]	Southwestern Bell Tele. St. Louis, MO	**Gary Pitts**	X	—	2,300
*74	52	American Bakeries Charlotte, NC	Jerry Green	X	—	2,272
[illegible]	[illegible]	Houston Lighting & Power Co. Houston, TX	**Richard Grasshoff**	X	—	2,200
[illegible]	58	Cox Enterprises, Inc. Atlanta, GA	Patsy Brownson	X	ARI, Wheels	2,113
[illegible]	[illegible]	USX Corp. Pittsburgh, PA	**Don Hillwig**	X	PH&H	2,046
78	—	Ecolab St. Paul, MN	Jerry Rodewald	X	—	2,000
[illegible]	[illegible]	Niagara Mohawk Power Corp. Syracuse, NY	**John Young**	X	—	1,896

'90 Rank	'89 Rank	Company & Headquarters	Fleet Contact(s)	Co. Owned	Lessor(s)	#Trucks &Vans
80	59	Columbia Gas Distribution Columbus, OH	Tim Webber	—	PH&H	1,877
[illegible]	[illegible]	Brown & Williamson Tobacco Corp. Louisville, KY	**Mike Cooley**	X	—	1,864
82	62	Pony Express Courier Corp. Charlotte, NC	William Glasheen	—	Associates	1,822
[illegible]	[illegible]	E.I. duPont de Nemours & Co. Wilmington, DE	**Richard G. Prettyman**	—	PH&H	1,820
84	—	New England Tel. Co. Springfield, MA	Thomas Glasheen	X	—	1,800
[illegible]	[illegible]	Montgomery Ward Chicago, IL	**Roseann Neveitt**	—	PH&H GEC Fleet	1,780
86	83	Motorola, Inc. Schaumburg, IL	Judy Baxter	X	—	1,775
[illegible]	[illegible]	McKesson Corp. San Francisco, CA	**Beverly A. Heim**	X	Wheels	1,762
88	66	JR Simplot Co. Mining/Mineral Pocatello, ID	Terry McLaughlin	—	Wheels	1,740
[illegible]	[illegible]	Marathon Oil Co. Houston, TX	**Liz Nikel**	X	PH&H, Wheels	1,715
90	73	Enron Corp. Houston, TX	Don Conant	X	—	1,700
[illegible]	[illegible]	Florida Power & Light St. Petersburg, FL	**George Lindemeyer**	X	—	1,685
92	68	Stroehmann Bakeries Horsham, PA	Dale Stevens	X	PH&H	1,650
[illegible]	[illegible]	Diebold Inc. Canton, OH	**Linda Taylor**	—	PH&H	1,600
94	90	Eastman Kodak Rochester, NY	Mark Hardway	X	PH&H	1,570
[illegible]	[illegible]	Flowers Industries, Inc Thomasville, GA	**Mark Worthey**	X	—	1,500

STATISTICS

'90 Rank	'89 Rank	Company & Headquarters	Fleet Contact(s)	Co. Owned	Lessor(s)	#Trucks &Vans
96	76	Amerigas Sacramento, CA	Jim Stevens	X	—	1,451
97	—	Public Service Co. of CO Denver, CO	Gerry Venard	X	—	1,414
98	77	Union Electric Co. St. Louis, MO	Walt Caesar	X	—	1,400
99	88	Arizona Public Service Phoenix, AZ	Doug McClymont	X	—	1,376
100	—	Northern Indiana Public Service Co. Gary, IN	John Graun	X	—	1,316
Total						546.771

Automotive Fleet's Top 100

Alphabetical Cross Reference

Company Name	Rank
ADT Security Systems	56
Airborne Freight Corp	15
Alabama Power Co	54
American Bakeries	74
American Elec. Power Service	38
Amerigas	96
Amoco Corp	31
ARA Services	19
Aratex Services	49
Arizona Public Service	99
Ashland Oil Co	39
Atchison Topeka Santa Fe RR	71
Bell Telephone of PA	64
BellSouth	3
Borden	18
Brown & Williamson Tobacco Corp	81
Burlington Northern	59
Campbell Taggart, Inc	27
Carolina Telephone Co.	60
Centel Corp.	40
Chemlawn	23
Chesapeake & Potomac	17
Columbia Gas Dist	80
ConRail	45
Consolidated Edison	32
Consumers Power Co	65
Contel	16
Continental Baking Co	12
Cox Enterprises, Inc	76
CSX Transportation	35
Dept. of Water & Power, City of L.A	44
Diebold Inc	93
Dow Chemical USA	70
Duke Power Co	42
Eastman Kodak	94
Ecolab	78
E.I. DuPont de Nemours & Co	83
Emery Worldwide	37
Enron Corp	90
Entemann Bakery, Inc	48
Exxon USA	41
Federal Express Corp	5
Florida Power & Light Co	91
Flowers Industries, Inc	95
Frito Lay, Inc	10
GE Consumer Service	47
General Public Utilities	50
Georgia Power Co	46
Goodyear Tire & Rubber	66
GTE	4
GTE Florida	21
Honeywell, Inc	62
Houston Lighting & Power Co	75
Interstate Brands Corp	20
JR Simplot Mining/Mineral	88
Johnson Controls	57
Marathon Oil Co	89
McKesson Corp	87
Montgomery Ward	85
Motorola, Inc	86
New England Telephone Co	84
New York Telephone	13
Niagara Mohawk Power Corp	79
Norfolk Southern	68
Northern Indiana Public Service Co	100
Pacific Bell	8
Penske Truck Leasing	11
Philip Morris USA	28
Phillips Petroleum	55
Pony Express Courier Corp	82
Public Service of CO	97
Quality Bakers America	6
R.J. Reynolds Tobacco Co	72
Rollins, Inc	26
Sears, Roebuck and Co	9
Service America Corp	39
Service Corporation Int'l	69
Shell Oil Co	25
Siemens Corp	51
SoCal Edison	29
Suburban Petroleum/Petrolane	58
S. New England Telecom. Corp	33
Southwestern Bell Telephone	73
Stroehmann Bakeries	92
Tenneco, Inc	52
Terminix Int'l	53
Texaco Inc	34
Tupperware Home Parties	14
TW Services	43
U-Haul	2
Union Electric Co	98
Union Pacific Railroad	24
United Artists	61
United Parcel Service	1
US West, Inc	7
USX Corp	77
Virginia Power	63
VPSI	30
Westinghouse	67
Xerox Corp	22

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LIGHT TRUCK AND VAN NEWS

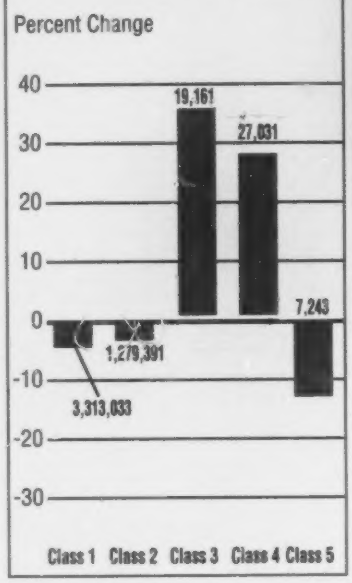
1989 Truck Sales Dropped Four Percent

New-truck sales totaled 4.9 million units in calendar year 1989, down four percent from the 5.1 million units sold in calendar year 1988, according to the National Automobile Dealers Association (NADA). Medium- and heavy-duty truck sales, at 312,000 units, were down seven percent from calendar year 1988. However, the biggest increase in truck sales came in the Class 3 and 4 categories.

The Class 3 truck market posted sales of 19,161 units, an increase of over 30 percent from calendar year 1988, while 27,031 Class 4 vehicles were sold, up nearly 30 percent from the previous year.

Despite selling fewer new trucks, franchised dealers had a five percent increase in total dollar sales, according to NADA.

Percent Change in New Truck Sales
by GVW for 1989 Calendar Year



Durakon Relocates Corporate Headquarters

Durakon Industries, a manufacturer of pickup truck bedliners, has relocated its corporate headquarters to a new facility in Ann Arbor, MI. The company's new address is 2301 Commonwealth Blvd., Ann Arbor, MI 48105. The phone number is (313) 998-0808 and the FAX is (313) 998-0388.

Reading Designs Special Service Body

Bryant Industrial, a crane and rigging company located in Morrisville, NC, recently purchased a specially-designed Reading Body Work's service body truck from Simpson Equipment of Wilson, NC. A completely self-contained rigging truck, the vehicle will provide on-scene support for all Bryant Industrial crane and rigging jobs.

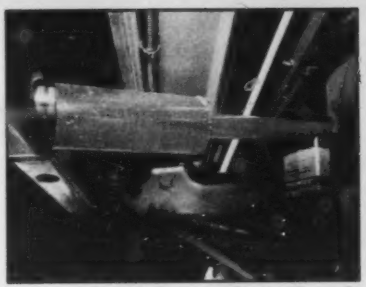
Reading's engineers designed and constructed the customized service body working from specifications provided by Bryant. Fourteen feet long and nearly eight feet wide, the body features six storage compartments on each side as well as a two-foot wide box in the front of the cargo bed.

The body is mounted on a Ford F-350 dual crew cab super-duty chassis.

Circle 216 on Inquiry Card

New Lock Protects GM Spare Tires

Granate Lock, a security feature designed to protect GM's new hoist-type spare-tire carrier, has been introduced by G.T.S.P. of Dallas, TX. Designed for Chevrolet and GMC pickups model years 1988-1991, the lock fits over the hoist shaft and extends out through the hole in the rear carrier about one inch. A padlock secures the lock in place. The Granate Lock is made of heavy-duty gauge steel and is zinc coated to resist rust. With spare tire in place, the lock installs in 10 seconds and requires no tools.



Circle 217 on Inquiry Card

Service Body Door Locks Prevent Theft

Harvey Distributing has introduced POP locks, power door locks for service body trucks. POP locks secure all service boxes at once and prevent the loss or theft that can occur when all boxes aren't secure.

The locking system saves drivers time and effort in securing service bodies and can be installed in minutes.

Circle 218 on Inquiry Card

NTEA Annual Convention Set For San Diego

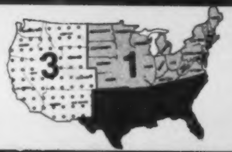
The 27th annual convention of the National Truck Equipment Association (NTEA) will be held Feb. 6-9, 1991 at the new San Diego Convention Center in San Diego, CA. Several technical/business programs will address concerns specific to the truck body and equipment industry, such as manufacturer/distributor relations, equipment installation procedures, and government regulations affecting commercial trucks.

For additional information on the convention, call the NTEA at (313) 462-2190.

Circle 219 on Inquiry Card

USED-CAR PRICES

The following are average used-car prices for the period ending November 1, 1990. Prices are based on wholesale activity at major dealers across the country. They are divided into three zones as indicated on the accompanying map. These averages are calculated electronically. They are based on clean cars only. Proper allowance should be made for upgrading sharp cars and proper deduction taken for fair cars. Automatic transmissions have been included in the averages of all models. This information is published in *Automotive Fleet* by special permission of *Automotive Market Report*.



89 BUICK SKYHAWK			
Coupe	6,232	6,293	6,106
Sedan	6,318	6,382	6,192
88 BUICK SKYHAWK			
Coupe	5,177	5,229	5,073
Sedan	5,249	5,301	5,144
89 BUICK SKYLARK			
Cust Sedan	7,269	7,342	7,124
88 BUICK SKYLARK			
Cust Sedan	6,161	6,222	6,036
89 BUICK CENTURY			
Cust Sedan	7,601	7,677	7,449
88 BUICK CENTURY			
Cust Sedan	6,124	6,186	6,003
89 BUICK LESABRE			
Cust Sedan	9,871	9,970	9,674
88 BUICK LESABRE			
Cust Sedan	8,127	8,209	7,965
89 CADILLAC DEVILLE			
Coupe	16,487	16,652	16,158
Sedan	16,667	16,834	16,333
88 CADILLAC DEVILLE			
Coupe	13,047	13,177	12,786
Sedan	13,200	13,331	12,935
89 CADILLAC SEVILLE			
Sedan	17,007	17,177	16,666
88 CADILLAC SEVILLE			
Sedan	13,936	14,076	13,657
89 CHEVY BERETTA			
Coupe	7,277	7,351	7,132
89 CHEVY CORSICA			
Htchbk 4 Dr.	6,934	7,003	6,795
88 CHEVY BERETTA			
Coupe	6,039	6,100	5,918
88 CHEVY CORSICA			
Sedan	5,587	5,642	5,474
89 CHEVY CAVALIER			
Sedan	5,891	5,951	5,774
88 CHEVY CAVALIER			
Sedan	4,942	4,992	4,844
89 CHEVY CELEBRITY			
Sedan	7,029	7,099	6,888
88 CHEVY CELEBRITY			
Sedan	5,628	5,685	5,516
89 CHEVY CAPRICE			
Sedan	7,958	8,037	7,798
88 CHEVY CAPRICE			
Sedan	6,435	6,499	6,307
89 CHRYSLER LEBARON			
Highline Sedan	7,034	7,104	6,892
88 CHRYSLER LEBARON			
Sedan	5,569	5,624	5,458
89 CHRYSLER NEW YORKER			
Sedan	11,213	11,325	10,989
88 CHRYSLER NEW YORKER			
Sedan	9,456	9,550	9,266
89 CHRYSLER FIFTH AVENUE			
Sedan	11,388	11,501	11,159
88 CHRYSLER FIFTH AVENUE			
Sedan	9,247	9,340	9,062
89 DODGE ARIES AMERICA			
Sedan	5,629	5,686	5,517
88 DODGE ARIES AMERICA			
Sedan	4,519	4,565	4,429
89 DODGE SHADOW			
Liftbk 5 Dr	5,940	5,999	5,820
88 DODGE SHADOW			
Liftbk 5 Dr	4,865	4,913	4,768
89 DODGE DYNASTY			
Sedan	8,485	8,571	8,315
89 FORD ESCORT			
Htchbk 4 Dr LX	6,331	6,395	6,204
88 FORD ESCORT			
Htchbk 4 Dr GL	4,034	4,074	3,953
89 FORD MUSTANG			
LX-4 Coupe	6,819	6,886	6,681
88 FORD MUSTANG			
LX-4 Coupe	5,652	5,709	5,540
89 FORD TEMPO			
GL Sedan 4 Dr	6,064	6,126	5,943
88 FORD TEMPO			
GL Sedan 4 Dr	5,009	5,059	4,908
89 FORD TAURUS			
GL Sedan 4 Dr	8,076	8,156	7,914
88 FORD TAURUS			
GL Sedan 4 Dr	6,486	6,552	6,357
89 FORD CROWN VICTORIA			
Sedan	10,558	10,663	10,347
88 FORD CROWN VICTORIA			
Sedan	8,626	8,713	8,453
89 THUNDERBIRD			
Coupe	9,514	9,608	9,323
88 THUNDERBIRD			
Coupe	7,760	7,837	7,605
89 LINCOLN			
Town Car Sedan	15,231	15,384	14,927
Continental Sedan	16,709	16,676	16,375
88 LINCOLN			
Town Car Sedan	12,825	12,953	12,567
Continental Sedan	14,624	14,771	14,332
89 MAZDA 626			
LX Sedan 4 Dr	9,320	9,414	9,134
89 MERCURY COUGAR			
LS Coupe	10,034	10,134	9,833
88 MERCURY COUGAR			
LS Coupe	8,261	8,344	8,096
89 MERCURY TOPAZ			
GS Sedan 4 Dr	6,226	6,289	6,102
88 MERCURY TOPAZ			
GS Sedan 4 Dr	5,112	5,163	5,010
89 MERCURY SABLE			
GS Sedan 4 Dr	8,139	8,221	7,976
88 MERCURY SABLE			
GS Sedan	6,607	6,673	6,474
89 MERCURY GRAND MARQUIS			
GS Sedan	11,136	11,248	10,914
88 MERCURY GRAND MARQUIS			
GS Sedan	9,274	9,367	9,089
89 MITSUBISHI MIRAGE			
Sedan 4 Dr	5,369	5,422	5,262
88 MITSUBISHI MIRAGE			
Sedan	4,045	4,088	3,965
89 NISSAN SENTRA			
Sedan 2 Dr	4,828	4,877	4,732
89 NISSAN STANZA			
E Ntch 4 Dr	8,040	8,122	7,880
89 NISSAN MAXIMA			
SE Sedan	13,322	13,457	13,057
88 NISSAN SENTRA			
Sedan 2 Dr	3,985	4,026	3,906
88 NISSAN STANZA			
E Ntch 4 Dr	6,514	6,579	6,384
88 NISSAN MAXIMA			
SE Sedan	10,228	10,330	10,022
89 OLDS CIERA			
Coupe	7,517	7,593	7,367
Sedan	7,601	7,677	7,449
88 OLDS CIERA			
Coupe	6,061	6,120	5,939
Sedan	6,124	6,186	6,003
89 OLDS CALAIS			
Sedan	6,663	6,730	6,530
88 OLDS CALAIS			
Sedan	6,131	6,192	6,009
89 OLDS CUTLASS SUPREME			
Coupe	8,134	8,216	7,972
88 OLDS CUTLASS SUPREME			
Coupe	7,163	7,235	7,021
89 OLDS 98 REGENCY			
Sedan	12,155	12,277	11,912
88 OLDS 98 REGENCY			
Sedan	9,726	9,823	9,531
89 PLYMOUTH RELIANT			
Sedan	5,604	5,660	5,492
88 PLYMOUTH RELIANT			
Sedan	4,543	4,588	4,452
89 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	5,940	5,999	5,820
88 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	4,861	4,909	4,764
89 PLYMOUTH GRAN FURY			
Salon Sedan	5,804	5,862	5,688
88 PLYMOUTH GRAN FURY			
Salon Sedan	4,755	4,802	4,660
89 ACCLAIM			
Sedan	6,814	6,882	6,678
89 PONTIAC SUNBIRD			
LE Sedan	6,192	6,255	6,069
SE Coupe	6,360	6,424	6,233
88 PONTIAC SUNBIRD			
SE Coupe	5,170	5,222	5,067
SE Sedan	5,241	5,292	5,135
89 PONTIAC 6000			
LE Sedan	7,262	7,333	7,116
88 PONTIAC 6000			
Coupe	5,737	5,794	5,622
Sedan	5,802	5,860	5,686
89 PONTIAC GRAND AM			
LE Sedan	7,330	7,404	7,183
88 PONTIAC GRAND AM			
Sedan	6,167	6,229	6,045
89 PONTIAC BONNEVILLE			
LE Sedan	9,515	9,611	9,325
88 PONTIAC BONNEVILLE			
LE Sedan	8,141	8,222	7,979
89 PONTIAC GRAND PRIX			
Coupe	8,308	8,392	8,142
88 PONTIAC GRAND PRIX			
Coupe	7,354	7,427	7,207
89 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	7,126	7,197	6,984
89 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	9,330	9,423	9,144
89 TOYOTA CRESSIDA			
Lux Sedan	14,616	14,761	14,324
88 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	5,977	6,037	5,858
88 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	7,909	7,987	7,752
88 TOYOTA CRESSIDA			
Lux Sedan	12,180	12,300	11,936
89 VOLKSWAGEN JETTA			
Sedan 4 Dr	7,774	7,852	7,618
88 VOLKSWAGEN JETTA			
Sedan 4 Dr	6,390	6,455	6,263
89 VOLVO			
240 DL Sedan	12,717	12,844	12,463
88 VOLVO			
240 DL Sedan	10,960	11,068	10,741

PRODUCTS

KEEP VEHICLES LOOKING BETTER THAN EVER with the new 1589 Dual Counter Rotating Side Brush from Sherman Industries. The new unit offers two pairs of tapered brushes that rotate clockwise and counterclockwise, respectively, to facilitate cleaning the sides of vehicles. In addition, a lock-in circuit for the brush allows brush hangers to retract after they make contact with the vehicle, but does not allow the brush hangers to extend further than necessary during the washing process. Also, each pair of brush hangers is steadied with a tie-rod connector mounted to a unitized stainless steel crossmember. The model 1589 requires minimum tunnel space and its efficient 13-inch brush cores include Sherman's unique "Roto-Disc" method of solution application. *Sherman Industries.*

Circle 226 on Inquiry Card

GAS PRICES

UNLEADED GAS
Cost Per Gallon

City	Full-Serve	Self-Serve
Little Rock, AR	158.4¢	128.9¢
Santa Barbara, CA	177.9	153.9
Hartford, CT	166.2	152.6
Dover, DE	143.2	132.4
Fort Meyers, FL	165.9	136.4
Atlanta, GA	147.7	124.8
Honolulu, HI	196.5	158.8
Dubuque, IA	176.2	143.2
Wichita, KS	167.6	129.3
New Orleans, LA	175.4	137.7
Lansing, MI	175.9	142.9
Springfield, MO	143.6	118.2
Las Vegas, NV	174.9	150.9
Portland, OR	150.9	N/A
Philadelphia, PA	154.0	141.9

The average U.S. full-serve gasoline price for the month of November was 157.7 cents per gallon.
The average U.S. self-serve gasoline price for the month of November was 139.8 cents per gallon.
Survey conducted during the first five working days of November 1990.
Supplied by Runzheimer International, Runzheimer Park, Rochester, WI.

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National Chemical Company is seeking established distributors or reps to sell a nationally branded coolant maintenance system and reconditioning chemical line to new and used car dealers, WD's and automotive after-market stores and service facilities. The chemical line is a high profit, low investment business. Call **708-409-5000** and ask for available territories.

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january 1991

automotive FLEET

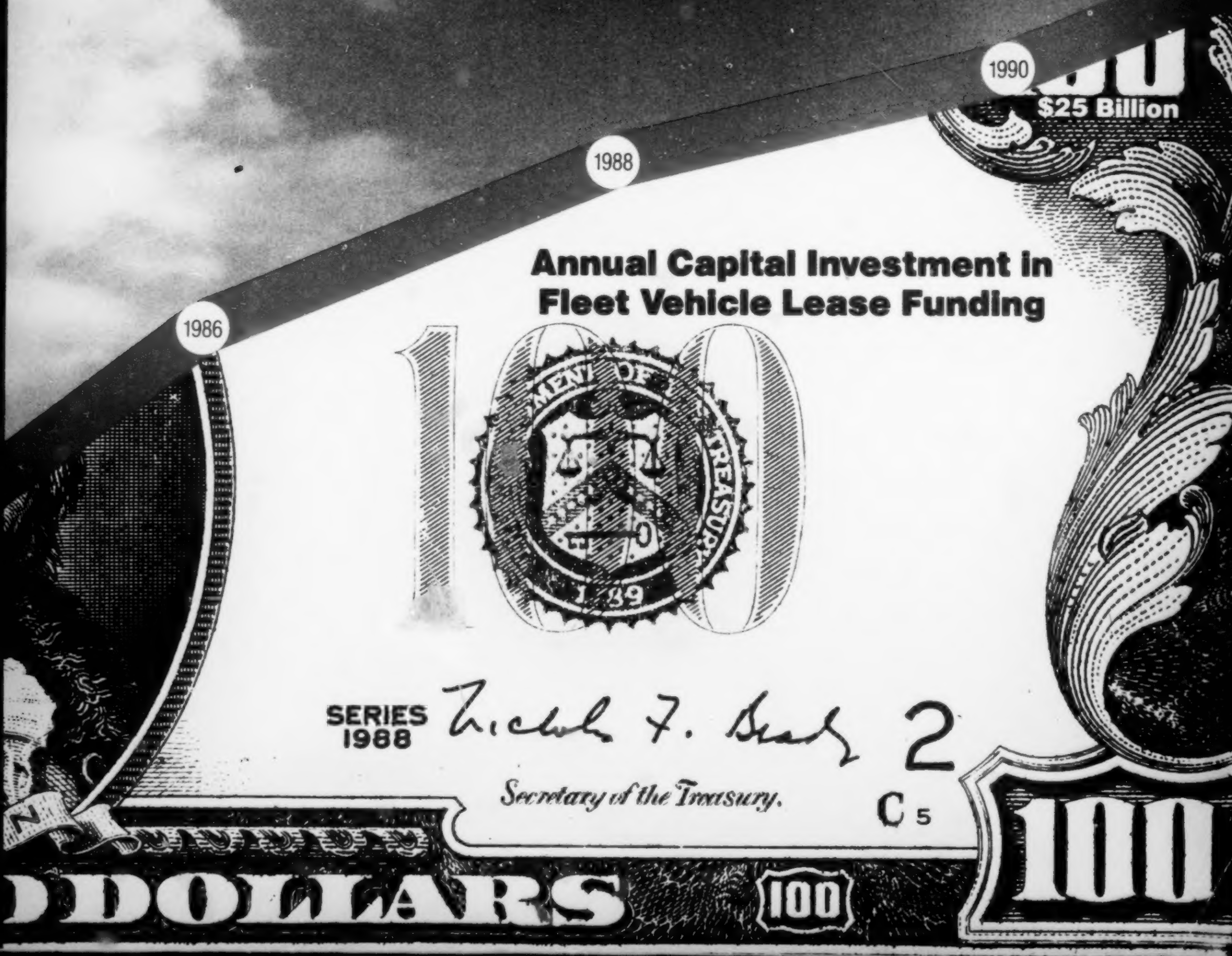
Key Trends in Fleet Management

1991 Leasing Industry Survey

Bundling vs. Unbundling

Managing a Utility Fleet

Fuel Cards Spark Debate


1990
$25 Billion
1988
Annual Capital Investment in Fleet Vehicle Lease Funding
1986
SERIES 1988
Secretary of the Treasury.
2
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100
DOLLARS
100

automotive
FLEET®

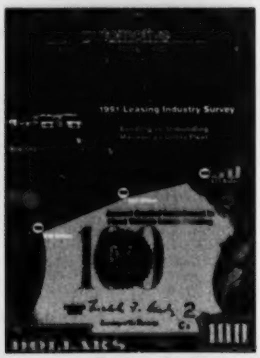
CAR AND LIGHT TRUCK FLEET AND LEASING MANAGEMENT MAGAZINE

January 1991
VOL. 30, NO. 3

Influencing the management of
4,952,000 cars and 2,070,000 light trucks
and vans in business, leasing, rental,
utility, government, police, and taxi fleets.

p. 31

p. 72



On the cover: Research shows that the annual capital investment in funding lease vehicles has hit an all-time high. For an in-depth look at this trend, see page 22 for the results of AF's biennial leasing survey.

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In addition to coordinating vehicle activities for seven regional telephone companies, Bell Atlantic's Jack Arrell is now in charge of monitoring compliance to safety regulations.

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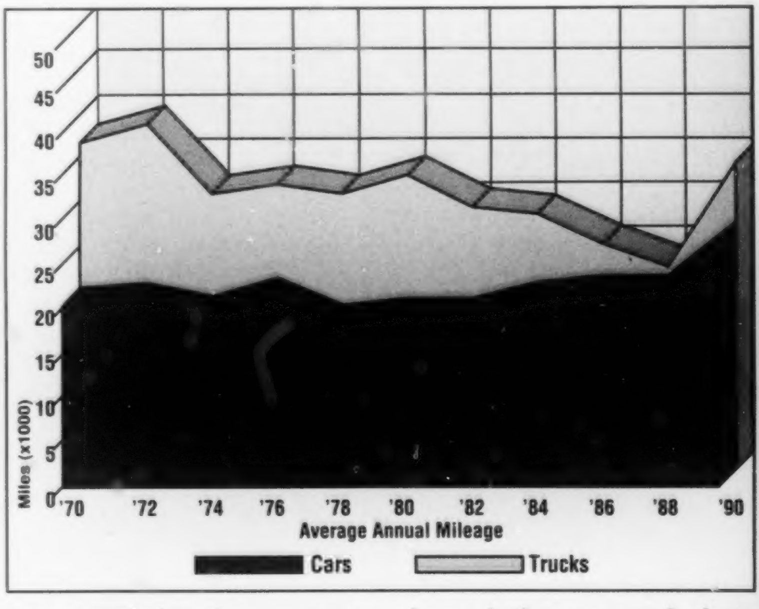
12th Biennial Leasing Survey Charts Industry Changes

More than one million cars and trucks in the nation's leased fleets are represented in this year's lessor survey. High on the list of of lessor concerns are manufacturer competition, legislation, and the future of the economy.



Fleet managers continue to increase the number of intermediate-sized cars they lease, keep them a little longer, and drive them more per year than ever before, according to the *Automotive Fleet* 1991 Biennial Leasing Survey.

This year's survey portrays the broadest spectrum of lessors in its 24-year history with nearly $18 billion of the leased car and truck fleet industry represented. This year's study also marks the end of the biennial survey, which will become an annual report starting in 1992.

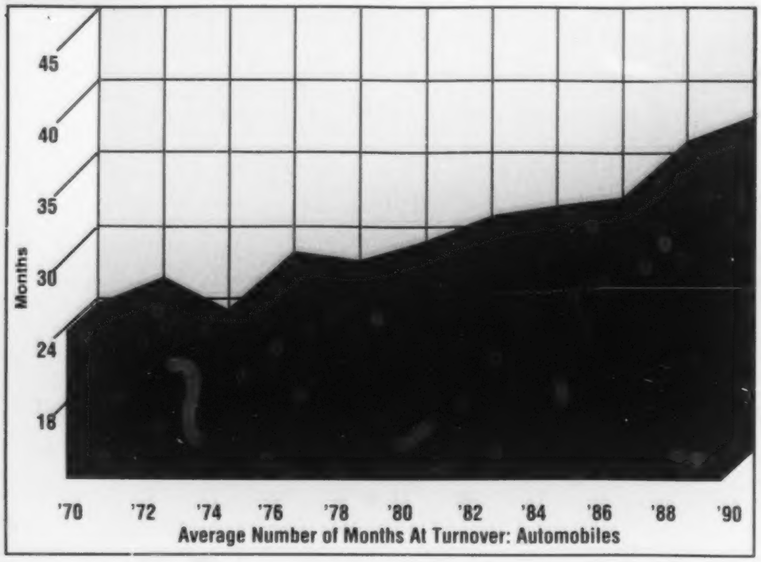
Of the companies that said they had an increase in the car leasing portion of their business, the average increase was 21.4 percent. Of those who said business had declined, the average was 15.5 percent.

Final figures of the survey show a total of 1,137,435 cars being tabulated, and for the companies who completed the type-of-car section of the survey, intermediates make up 65.7 percent of their cars, up from 52 percent in the 1988 survey. The next most popular size of car, standard size, dropped nearly five percent from the last reported figures. Compacts comprised the next largest group at 11 percent, although this category showed a six percent drop from the 1988 study. Subcompacts edged out luxury cars at 3.7 percent to 3.3 percent, respectively, and a new category for the leasing survey, sports/specialty vehicles, registered one percent of this section of the survey.

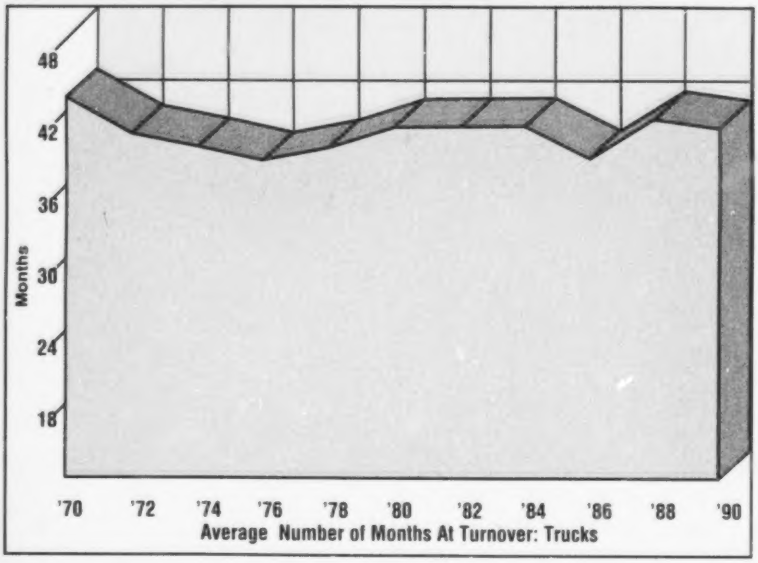
Average capitalized cost per car for 1990 was $16,309 which continues the nearly $2,000 per vehicle increase that the survey has registered every two years since 1984.

Cars are also being kept in service longer, but not by much. Average age at replacement was 36 months for 1990, compared to 35.7 months for 1988. One of the most dramatic changes in the survey results, however, was in the annual mileage category, which showed a nearly 8,000 mile increase from the 1988 survey (26,322 miles in 1990, compared to18,534 miles in 1988).

The survey also revealed that fewer leasing companies were affiliated with a new car dealer in 1990, with 77 percent saying they have no affiliation, up from 72 percent in 1988. Survey participants also voiced a concern with dealership practices and the increase in factory-funded



Average Number of Months At Turnover: Automobiles



Average Number of Months At Turnover: Trucks

lease programs, sentiments that carried over from the 1988 study.

When asked what they considered to be the major problem facing the leasing industry, many respondents had comments related to these captive finance company programs. Some of the responses include:

- "As an independent lessor, the manufacturers have made leasing to individuals impossible. Manufacturers are subsidizing interest costs as well as residual values through their own finance institutions. At the same time, these finance institutions charge the independent lessor at the same rate structure that has prevailed for years."
- "No private leasing company can compete with grossly inflated residual values and below-Prime Rate financing. Consumers are soured because the terms of the lease are never fully explained by the new-car salesmen. The customer will never lease another car, and in fact becomes a walking advertisement *against* leasing."

Retail Leasing: Shifting Demographics

In a survey of more than 24,000 consumers who leased rather than purchased a 1989- or 1990-model automobile, fewer than 20 percent of first-time lessees believe they were fully informed about the terms of their contract, yet 74 percent said they will lease again.

The survey did not include commercial fleet or government leases and was conducted in October and November of 1990.

Based on trends in key markets, consumer leasing will exceed 40 percent of all retail automobile deliveries within the decade, says Art Spinella, formerly an editor with Ward's Communications who recently rejoined CNW Marketing Co. as automotive research director.

Other findings of the study:

- First-time lessees are younger and have a lower household income and completed fewer years of formal education than veteran lessees, indicating that the lease option is no longer just for the wealthy and is being accepted by more "average" Americans.
- Median household income of first-time lessees is approximately $46,400, compared with $74,100 for veteran lessees.
- Of first-time lessees, 13.8 percent are women. Of veteran lessees, the percentage is only 8.8 percent, indicating more women now consider leasing an alternative to buying a new car.

"It's clear that leasing is becoming more attractive to middle-income Americans than it was a few years ago," Spinella says. "While the majority of leases were once high-end luxury cars, leases are now being written on all types of vehicles, including the under $10,000 compacts."

A complete copy of the CNW survey is available from CNW Marketing Co., [illegible] Lane, Bandon, OR [illegible]

- "Brokered leases through banks and manufacturers have made price the only criterion, resulting in no profit and no customer service."

Other problems listed include the downturn in the economy, growing difficulty finding affordable lines of credit, state and federal legislation, and a lack of public knowledge about how leases work.

Other survey results show that trends in the type of lease most often written appear to be changing. For the respondents who completed the lease-type portion of the questionnaire, 81 percent of their cars were leased under a finance lease, up from 77 percent in the previous survey. Fixed leases are on the decline, and at 13 percent is the smallest percentage registered for this type of lease since 1978. Full or partial maintenance leases compose 3.3 percent, and maintenance management leases netted two percent.

For trucks, of those respondents who said there was an increase in their truck business during the past two years, the average increase was 20.2 percent. Of those who responded that there was a decrease in their truck leasing, the average was 17.6 percent. The average age at replacement stayed about the same as the last published results, down from 41.6 months to 41 months but, as with cars, truck mileage per year increased dramatically, from 21,972 miles per year in 1988 to 34,007 miles per year in this year's survey. The average capitalized cost remained little changed, with 1990 figures showing a $17,711 per truck cost, and $17,433 per truck in 1988.

A total of 158,262 trucks are represented in the survey, with 66.8 percent falling into the under 10,000-lb. category, 15.8 percent in the Class 3-5 category, and 17.3 percent in the Class 6-8 category.

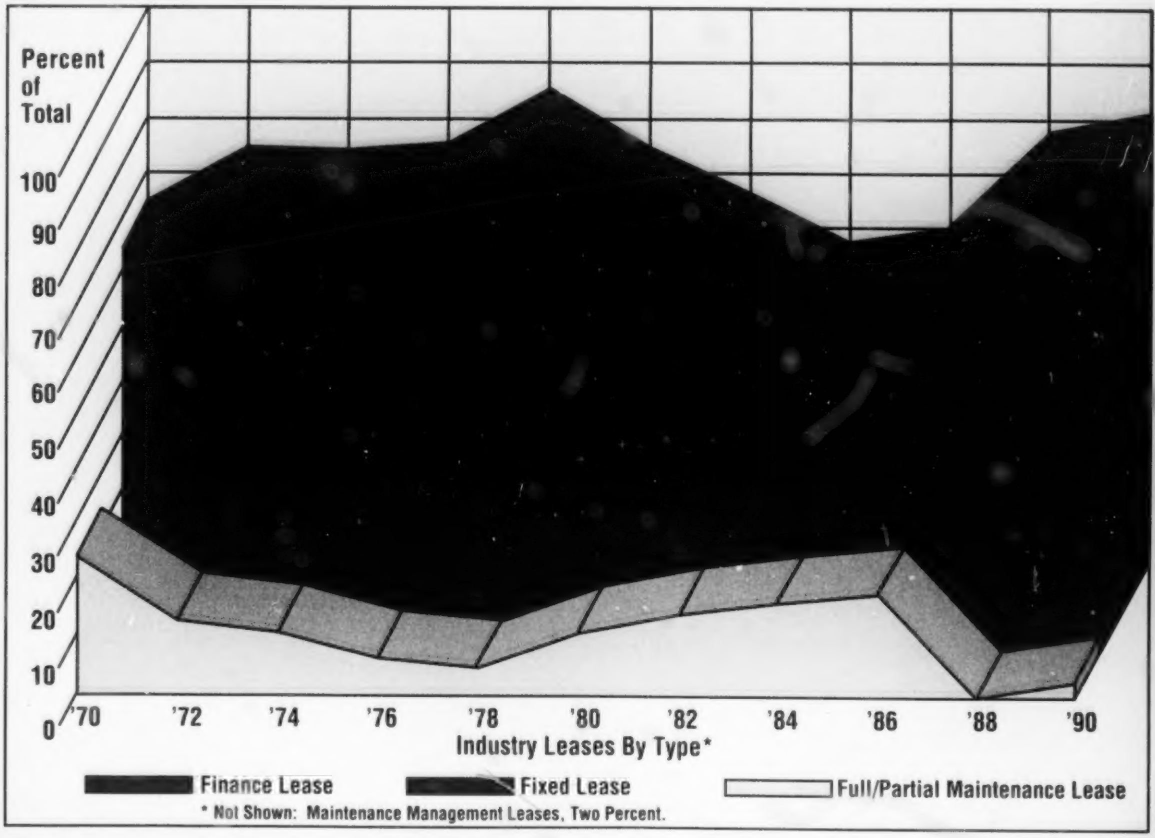
(Survey results appear on page 28.)

Survey Methodology

Continuing the methods used for the 1988 Leasing Survey, the 1991 study was conducted only among leasing companies and did not include car-rental companies. Care was taken to ensure that multiple responses from individual companies were minimized.

A total of 1,300 questionnaires were mailed out, and usable responses came back from 210 of those, which translates to 16.1 percent response. Statisticians generally agree that a response ratio of five percent or more to a direct mail survey is an excellent response rate.

The companies that responded varied in size of operation from less than 10 vehicles to more than 450,000 vehicles.



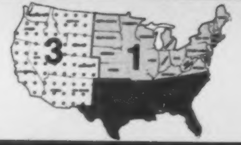
COMPARISON OF 1991 SURVEY RESULTS WITH PREVIOUS POLLS

	1990	1988	1986	1984	1982	1980	1978	1976	1974	1972	1970
■ **Survey Return - in Percent**	16.1	14.4	8.9	12.9	7.8	14.9	15.0	15.0	13.0	11.0	10.0
■ **Is Your Company a New-Car Dealer Affiliate?**											
Yes - in Percent	33.3	28.0	32.0	26.1	29.1	34.9	41.7	40.7	38.0	39.0	39.0
No - in Percent	77.7	72.0	68.0	73.9	68.9	65.1	58.3	59.3	62.0	61.0	61.0
■ **Average Age of Vehicles at Replacement**											
Cars - (Months)	36.0	35.7	32.0	32.1	30.7	28.5	26.9	25.9	24.3	25.2	23.7
Trucks - (Months)	41.0	41.6	39.0	40.2	39.3	39.3	37.6	37.5	38.2	41.5	42.5
■ **Average Yearly Mileage Operated per Vehicle**											
Cars - (Miles)	26,322	18,534	20,063	20,579	19,250	20,115	19,870	21,563	20,904	22,244	22,170
Trucks - (Miles)	34,007	21,972	25,097	29,535	30,762	32,159	31,335	32,489	30,484	37,159	36,853
■ **Type of Car (Percent in Each Category)**											
Subcompacts	3.7	3.0	12.0	7.0	14.0	N/A	N/A	N/A	N/A	N/A	N/A
Compacts	11.1	18.0	12.0	10.0	23.0	12.0	13.0	13.0	16.0	8.0	5.0
Intermediate	65.7	52.0	43.0	51.0	32.0	42.0	36.0	44.0	38.0	16.0	11.0
Standard	15.2	20.0	25.0	23.0	20.0	32.0	29.0	21.0	33.0	39.0	36.0
Luxury	3.2	7.0	8.0	9.0	11.0	5.0	10.0	8.0	8.0	9.0	10.0
Sports/Specialty	0.9	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
■ **Percentage of Cars Leased**											
To Fleets	87.3	84.0	81.0	82.0	74.0	83.0	80.0	82.0	79.0	78.0	74.0
To Individuals	16.4	16.0	19.0	18.0	26.0	17.0	20.0	18.0	21.0	22.0	26.0
■ **Total Number of Cars in Survey**											
▲	1,137,453	126,166	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
■ **Type of Lease**											
Finance Leasing - Percent ▲	80.8	77.0	59.0	58.0	69.0	73.0	82.0	75.0	72.0	76.0	62.0
Fixed (Net) Leasing - Percent ▲	13.7	22.0	23.0	27.0	15.0	17.0	13.0	15.0	15.0	13.0	12.0
Full or Partial Maintenance - Percent ▲ (Lessor Responsibility)	2.0	1.0	18.0	15.0	16.0	10.0	5.0	10.0	13.0	11.0	26.0
Maintenance Management - Percent ▲ (Lessee Responsibility)	3.2	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
■ **Average Capitalized Cost per Car**											
▲	$16,309	$14,350	$12,380	$10,467	$9,500	$7,461	$6,343	$5,392	$5,203	$3,987	$3,510
■ **Truck Types**											
Under 10,000 GVW - Percent	66.8	88.0	56.0	68.0	56.0	57.0	64.0	77.0	48.0	N/A	N/A
10,001 - 19,500 GVW - Percent	15.8	7.0	9.0	18.0	21.0	17.0	22.0	12.0	22.0	68.0	54.0
Over 19,500 GVW - Percent	17.3	5.0	35.0	14.0	23.0	26.0	14.0	11.0	30.0	32.0	46.0
■ **Total Number of Trucks in Survey**											
▲	158,262	48,214	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
■ **Average Capitalized Cost per Truck**											
▲	$17,711	$17,433	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Note: The results of the 1991 Survey of the leasing industry are copyrighted material and as such may not be reproduced in any form without the consent of the publisher. Reprints are available through: Automotive Fleet, 2512 Artesia Blvd., Redondo Beach, CA 90278. Phone: (213) 376-8788

USED-CAR PRICES

The following are average used-car prices for the period ending December 1, 1990. Prices are based on wholesale activity at major dealers across the country. They are divided into three zones as indicated on the accompanying map. These averages are calculated electronically. They are based on clean cars only. Proper allowance should be made for upgrading sharp cars and proper deduction taken for fair cars. Automatic transmissions have been included in the averages of all models. This information is published in *Automotive Fleet* by special permission of *Automotive Market Report.*



AVERAGE AUCTION PRICE

Model	Zone 1	Zone 2	Zone 3
89 BUICK SKYHAWK			
Coupe	6,047	6,160	5,924
Sedan	6,130	6,192	6,008
88 BUICK SKYHAWK			
Coupe	5,023	5,074	4,922
Sedan	5,092	5,143	4,991
89 BUICK SKYLARK			
Cust Sedan	7,074	7,145	6,933
88 BUICK SKYLARK			
Cust Sedan	5,978	6,037	5,856
89 BUICK CENTURY			
Cust Sedan	7,375	7,449	[illegible]
88 BUICK CENTURY			
Cust Sedan	5,942	6,002	5,824
89 BUICK LESABRE			
Cust Sedan	9,529	9,624	9,338
88 BUICK LESABRE			
Cust Sedan	7,885	7,965	7,728
89 CADILLAC DEVILLE			
Coupe	16,077	16,238	15,756
Sedan	16,252	16,416	15,927
88 CADILLAC DEVILLE			
Coupe	12,723	12,849	12,468
Sedan	12,872	13,000	12,614
89 CADILLAC SEVILLE			
Sedan	16,333	16,497	16,005
88 CADILLAC SEVILLE			
Sedan	13,521	13,657	13,250
89 CHEVY BERETTA			
Coupe	6,988	7,060	6,849
89 CHEVY CORSICA			
Hatchback 4 dr.	6,659	6,726	6,526
88 CHEVY BERETTA			
Coupe	5,859	5,918	5,742
88 CHEVY CORSICA			
Sedan	5,420	5,474	5,311
89 CHEVY CAVALIER			
Sedan	5,716	5,774	5,602
88 CHEVY CAVALIER			
Sedan	4,771	4,819	4,676
89 CHEVY CELEBRITY			
Sedan	6,806	6,874	6,670
88 CHEVY CELEBRITY			
Sedan	5,421	5,476	5,314
89 CHEVY CAPRICE			
Sedan	7,682	7,758	7,527
88 CHEVY CAPRICE			
Sedan	6,211	6,274	6,088
89 CHRYSLER LE BARON			
Highline Sedan	6,846	6,914	6,707
88 CHRYSLER LE BARON			
Sedan	5,375	5,429	5,268
89 CHRYSLER NEW YORKER			
Sedan	10,846	10,954	10,629
88 CHRYSLER NEW YORKER			
Sedan	9,128	9,219	8,944
89 CHRYSLER FIFTH AVENUE			
Sedan	10,993	11,101	10,772
88 CHRYSLER FIFTH AVENUE			
Sedan	8,880	8,970	8,703
89 DODGE ARIES AMERICA			
Sedan	5,406	5,461	5,299
88 DODGE ARIES AMERICA			
Sedan	4,318	4,362	4,231
89 DODGE SHADOW			
Liftbk 5 Dr	5,734	5,791	5,618
88 DODGE SHADOW			
Liftbk 5 Dr	4,648	4,6[illegible]4	4,555
89 DODGE DYNASTY			
Sedan	8,233	8,31[illegible]	8,067
89 FORD ESCORT			
Htchbk 4 Dr LX	5,001	5,015	4,901
88 FORD ESCORT			
Htchbk 4 Dr GL	3,894	3,933	3,816
89 FORD MUSTANG			
LX-4 Coupe	6,583	6,647	6,449
88 FORD MUSTANG			
LX-4 Coupe	5,428	5,483	5,320
89 FORD TEMPO			
GL Sedan 4 Dr	5,871	5,931	5,754
88 FORD TEMPO			
GL Sedan 4 Dr	5,010	5,061	4,910
89 FORD TAURUS			
GL Sedan 4 Dr	7,796	7,873	7,639
88 FORD TAURUS			
GL Sedan 4 Dr	6,229	6,293	6,105
89 FORD CROWN VICTORIA			
Sedan	10,192	10,293	9,988
88 FORD CROWN VICTORIA			
Sedan	8,344	8,428	8,176
89 THUNDERBIRD			
Coupe	9,184	9,275	8,998
88 THUNDERBIRD			
Coupe	7,491	7,565	7,341
89 LINCOLN			
Town Car Sedan	14,628	14,774	14,335
Mark VII LSC Coupe	15,877	16,036	15,560
Continental Sedan	15,884	16,043	15,567
88 LINCOLN			
Town Car Sedan	12,444	12,568	12,192
Mark VII LSC Coupe	13,764	13,902	13,490
Continental Sedan	13,974	14,144	13,694
89 MAZDA 626			
LX Sedan 4 Dr	9,180	9,272	8,997
89 MERCURY COUGAR			
LS Coupe	9,685	9,782	9,492
88 MERCURY COUGAR			
LS Coupe	7,974	8,055	7,815
89 MERCURY TOPAZ			
GS Sedan 4 Dr	6,029	6,090	5,908
88 MERCURY TOPAZ			
GS Sedan 4 Dr	4,910	4,959	4,812
89 MERCURY SABLE			
GS Sedan 4 Dr	7,857	7,936	7,699
88 MERCURY SABLE			
GS Sedan	6,345	6,409	6,218
89 MERCURY GRAND MARQUIS			
GS Sedan	10,750	10,857	10,535
88 MERCURY GRAND MARQUIS			
GS Sedan	8,952	9,041	8,774
89 MITSUBISHI MIRAGE			
Sedan 4 Dr	5,315	5,369	5,209
88 MITSUBISHI MIRAGE			
Sedan	3,924	3,962	3,845
89 NISSAN SENTRA			
Sedan 2 Dr	4,707	4,754	4,613
89 NISSAN STANZA			
E Ntch 4 Dr	7,916	7,998	7,761
89 NISSAN MAXIMA			
SE Sedan	13,122	13,[illegible]	12,860
88 NISSAN SENTRA			
Sedan 2 Dr	3,885	3,924	3,807
88 NISSAN STANZA			
E Ntch 4 Dr	6,416	6,480	6,288
88 NISSAN MAXIMA			
SE Sedan	10,075	10,175	9,873
89 OLDS CIERA			
Coupe	7,293	7,367	7,147
Sedan	7,375	7,449	7,227
88 OLDS CIERA			
Coupe	5,880	5,938	5,762
Sedan	5,942	6,002	5,824
89 OLDS CALAIS			
Sedan	6,484	6,549	6,355
88 OLDS CALAIS			
Sedan	5,948	6,008	5,830
89 OLDS CUTLASS SUPREME			
Coupe	7,932	8,012	7,774
88 OLDS CUTLASS SUPREME			
Coupe	6,950	7,019	6,812
89 OLDS 98 REGENCY			
Sedan	11,734	11,851	11,498
88 OLDS 98 REGENCY			
Sedan	9,388	9,482	9,200
89 PLYMOUTH RELIANT			
Sedan	5,380	5,436	5,274
88 PLYMOUTH RELIANT			
Sedan	4,341	4,384	4,254
89 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	5,734	5,791	5,618
88 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	4,644	4,690	4,552
89 PLYMOUTH GRAN FURY			
Salon Sedan	5,603	5,659	5,419
88 PLYMOUTH GRAN FURY			
Salon Sedan	4,567	4,612	4,476
89 ACCLAIM			
Sedan	6,544	6,610	6,414
89 PONTIAC SUNBIRD			
LE Sedan	6,008	6,069	5,888
SE Coupe	5,927	5,987	5,810
88 PONTIAC SUNBIRD			
SE Coupe	5,016	5,067	4,916
SE Sedan	5,065	5,135	4,982
89 PONTIAC 6000			
LE Sedan	7,031	7,100	6,890
88 PONTIAC 6000			
Coupe	5,526	5,582	5,415
Sedan	5,589	5,645	5,477
89 PONTIAC GRAND AM			
LE Sedan	7,097	7,169	6,955
88 PONTIAC GRAND AM			
Sedan	5,953	6,013	5,835
89 PONTIAC BONNEVILLE			
LE Sedan	9,279	9,372	9,094
88 PONTIAC BONNEVILLE			
LE Sedan	8,631	8,717	8,458
89 PONTIAC GRAND PRIX			
Coupe	8,060	8,142	7,900
88 PONTIAC GRAND PRIX			
Coupe	7,099	7,107	6,957
89 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	6,983	7,053	6,843
89 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	9,097	9,187	8,914
89 TOYOTA CRESSIDA			
Lux Sedan	14,324	14,467	14,038
88 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	5,857	5,916	5,740
88 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	7,751	7,828	7,596
88 TOYOTA CRESSIDA			
Lux Sedan	11,936	12,056	11,697
89 VOLKSWAGEN JETTA			
Sedan 4 Dr	7,580	7,656	7,429
88 VOLKSWAGEN JETTA			
Sedan 4 Dr	6,230	6,293	6,105
89 VOLVO			
240 DL Sedan	12,335	12,459	12,089
88 VOLVO			
240 DL Sedan	10,576	10,683	10,365

PRODUCTS

tanks. The kit is designed to meet federal environmental regulations that require periodic testing of tanks for leakage. *MSA.*

Circle 228 on Inquiry Card

RECEIVE BETTER CELLULAR RECEPTION with the new Mighty Mount series of pedestal mounts and extensions for mobile cellular phones. Made from solid aluminum bar-stock, the units contain a multiple-hole top plate to fit almost all makes of cellular phones and can be installed in various locations. Mounting of the units is simplified with pre-installed easy-grip thumbscrews and Allen screws. A full, lifetime warranty accompanies the units. *The Antenna Company.*

Circle 229 on Inquiry Card

GAS PRICES

UNLEADED GAS
Cost Per Gallon

City	Full-Serve	Self-Serve
Juneau, AK	197.4¢	179.6¢
Birmingham, AL	148.9	128.6
Phoenix, AZ	172.2	139.9
Long Beach, CA	182.9	141.9
Pueblo, CO	155.9	140.4
Washington, D.C.	177.6	147.3
Maui, HI	210.2	167.9
Chicago, IL	182.6	153.5
Louisville, KY	160.7	136.7
Worcester, MA	159.9	146.4
Bangor, ME	164.2	151.9
Minneapolis, MN	178.5	140.3
Jackson, MS	164.4	133.2
New York City, NY	160.6	146.9
San Antonio, TX	164.6	135.9

The average U.S. full-serve gasoline price for the month of December was 159.2 cents per gallon.
The average U.S. self-serve gasoline price for the month of December was 140.9 cents per gallon.
Survey conducted during the first five working days of December 1990.
Supplied by Runzheimer International, Runzheimer Park, Rochester, WI.

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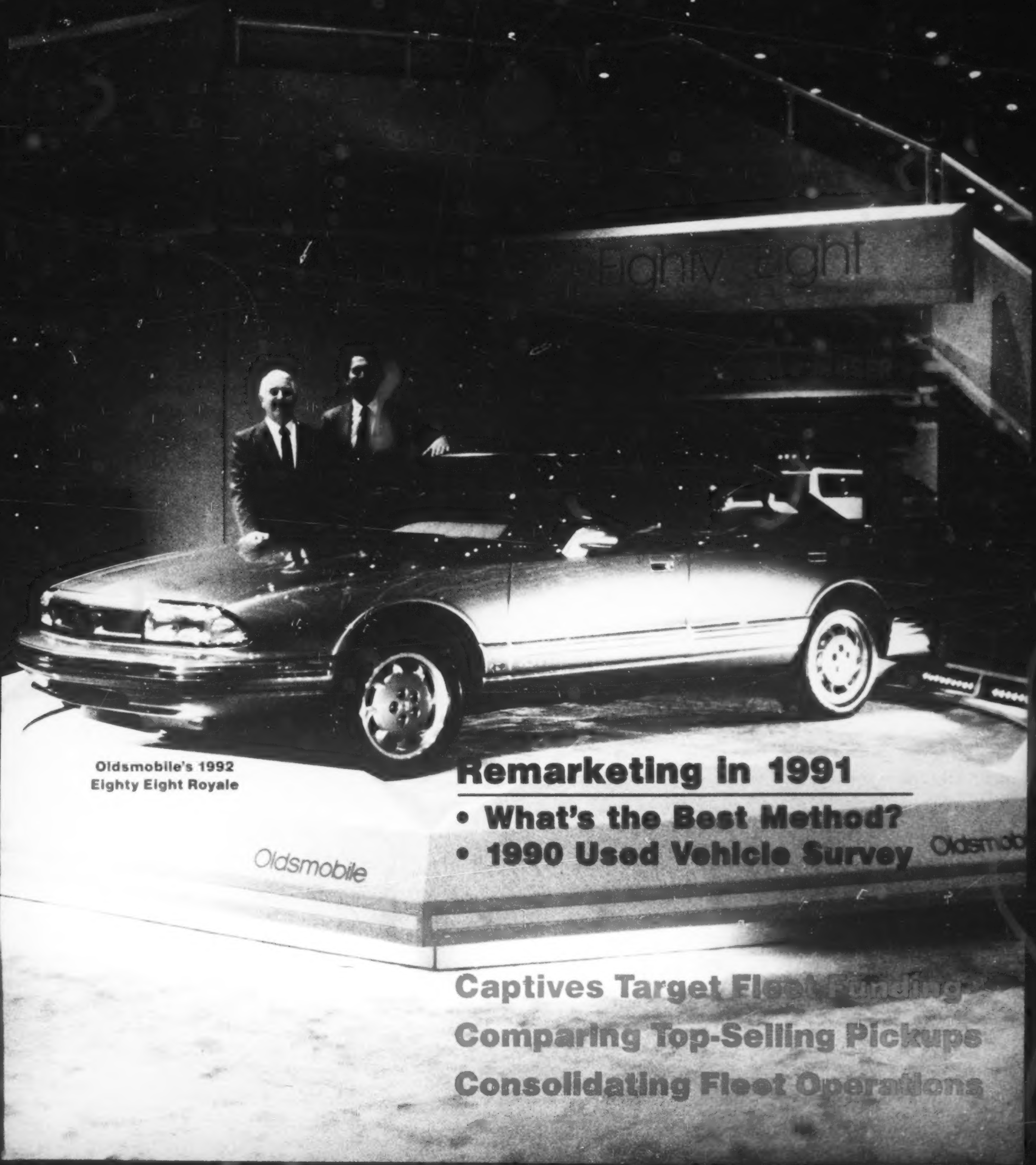
CAR AND LIGHT TRUCK FLEET AND LEASING MANAGEMENT MAGAZINE



Oldsmobile's 1992
Eighty Eight Royale

Remarketing in 1991

- What's the Best Method?
- 1990 Used Vehicle Survey

Captives Target Fleet Funding

Comparing Top-Selling Pickups

Consolidating Fleet Operations

automotive
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CAR AND LIGHT TRUCK FLEET AND LEASING MANAGEMENT MAGAZINE

BOBIT PUBLISHING

February 1991
VOL. 30, NO. 4

Influencing the management of
4,952,000 cars and 2,070,000 light trucks
and vans in business, leasing, rental,
utility, government, police, and taxi fleets.

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For certain fleets, such as delivery and utility, knowing where vehicles are at all times can help increase productivity and reduce costs.

On the Cover: The 1992 Olds Eighty Eight Royale debuts at the North American International Auto Show in Detroit. Pictured with the car is Chuck Dietrick, Oldsmobile's director of national fleet sales (left), and Mike Losh, general manager of Oldsmobile. See page 46.

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State Gasoline Taxes Vary Widely

The Federal Excise Tax on gasoline was increased five cents a gallon to 14 cents in December 1990, however, state taxes still vary widely, from a low of four cents a gallon in Florida to 22 cents in Connecticut and Washington.

The following chart is a state-by-state breakdown, ranging from the highest tax to the lowest tax.

State	Tax	State	Tax
Connecticut	22¢	Nevada	16.5¢
Washington	22¢	New Mexico	16.2¢
Nebraska	21.9¢	Delaware	16¢
North Carolina	21.5¢	Kansas	16¢
Wisconsin	21.5¢	New Hampshire	16¢
Colorado	20¢	Oklahoma	16¢
Iowa	20¢	South Carolina	16¢
Ohio	20¢	West Virginia	15.5¢
Louisiana	20¢	Indiana	15¢
Minnesota	20¢	Kentucky	15¢
Montana	20¢	Michigan	15¢
Rhode Island	20¢	Texas	15¢
Tennessee	20¢	Vermont	15¢
Illinois	19¢	California	14¢
Utah	19¢	Arkansas	13¢
Maryland	18.5¢	Pennsylvania	12¢
Idaho	18¢	Alabama	11¢
Mississippi	18¢	Hawaii	11¢
Oregon	18¢	Missouri	11¢
South Dakota	18¢	New Jersey	10.5¢
Virginia	17.5¢	Wyoming	9¢
Arizona	17¢	Alaska	8¢
Maine	17¢	New York	8¢
Massachusetts	17¢	Georgia	7.5¢
North Dakota	17¢	Florida	4¢

GM and ETAK Modify License Agreement

ETAK reported that General Motors has amended the patent license and technology agreement between the two companies to allow ETAK to make its navigational technology available to other automakers building and selling cars in North America.

This option was part of the 1985 agreement that gave GM exclusive North American OEM rights to ETAK's dead reckoning and map-matching technology for in-vehicle navigation. All other aspects of the agreement, which continues in force until expiration of ETAK's patents, remain essentially unchanged.

"Now that GM is enabling us to license our navigation technology to other North American OEM automakers, we are confident we will see rapid introduction of on-board navigation by the entire U.S. auto industry," said Stanley Honey, ETAK's president.

ETAK maps are widely used by truck fleets for routing and scheduling, by dispatch centers for public safety and emergency vehicles, and by utilities for facilities management.

Ford Announces New Car Warranty Policy

Ford Motor Co. announced that 1991-model Ford and Mercury cars and Ford trucks will be covered by a basic 12-month/12,000-mile warranty.

An extended powertrain coverage of 48 months or 50,000 miles is offered with a $50 deductible per repair visit after the basic 12-month/12,000-mile period expires.

The new program replaces the six-year or 60,000-mile powertrain warranty previously offered.

In addition, Lincoln automobiles are now covered by a bumper-to-bumper program for 48 months or 50,000 miles, whichever comes first, with no deductible. Only tires, service adjustments, battery, normal maintenance, damage, and wear items such as brake pads are not covered.

Alternate Fuel Conversion Study Sought

Recent state legislation passed by the Louisiana legislature requires the commissioner of administration to not purchase or lease any vehicle after Sept. 1, 1991 unless it is capable of and equipped for using an alternative fuel, and as such meets or exceeds the federal Clean Air Act standards. In addition, 80 percent of the state-owned fleet must be capable of using alternate fuels by Sept. 1, 1998.

In response, the Louisiana Division of Administration, State Fleet Management is inviting proposals from interested firms to conduct a feasibility study and a cost/benefit analysis of the use of alternate fuels for Louisiana's motor vehicle fleet. Deadline for the proposal is March 15, 1991 at 10:00 a.m., Central time.

Additional information and/or request-for-proposals can be obtained by writing Mr. Louis Amedee, state fleet manager, P.O. Box 94095, Baton Rouge, Louisiana 70808-9095, or by calling (504) 342-6890.

REMARKETING

What Are Your Fleet Remarketing Options?

Effective remarketing recaptures a percentage of a company's fleet investment, however, the key is more than just selling vehicles; it's using the best method to earn the highest price in the shortest period of time.

Today's fleet cars all have one thing in common: sooner or later they will need to be remarketed. The often-asked question by fleet managers is: "Which method of sales is best?" Today, the most widely-used avenues of disposing of used fleet units are auto auctions, sales to employees, trade-ins, returns to lessors, and wholesalers.

Each of these remarketing methods has unique advantages and disadvantages. However, the goal of used-vehicle remarketing is to achieve the highest available price in the shortest period of time. This means channeling the highest volume cars toward whichever method performs the best at any given time or with certain types of vehicles. This also means analyzing the existing used-car market and identifying which method is most likely to be successful.

The following article examines various remarketing methods and how they can be used for successful used-vehicle disposal.

Competitive Bidding

Auto auctions are a leading distribution channel for used fleet units. According to the National Auto Auction Association, auto auctions offered between 10 and 11 million vehicles for sale in 1990.

LANE 5
LANE 4
3
2
1

Auto auctions are a leading remarketing outlet for used fleet units because of the features they offer, such as vehicle transport, reconditioning services, vehicle security, and condition reports. In addition, many fleets benefit financially from the competitive bidding process at auctions.

Auto auctions typically provide specialized services to both sellers and purchasers of used fleet units, such as vehicle transport, condition reports, vehicle security, and reconditioning services. One key advantage of using auctions is their ability to generate competitive prices for used vehicles by exposing fleet vehicles to numerous buyers. "Auto auctions are the fairest method of vehicle remarketing because of competitive bidding," says Bob McDevitt, vice president, sales and marketing for Anglo American Auto Auctions. "During the auction process, used cars seek the level of their true worth."

Most auction chains offer fleets programs to assist in the remarketing process. For example, Anglo American's Auction Managed Fleet Plan offers management services designed to obtain competitive prices for fleet vehicles. By using a centralized computer system, Anglo's remarketing managers can consolidate nationwide inventories, recommend market pricing, administer paperwork, and process vehicle sale proceeds. In addition to their 25 auctions, Anglo has contracted with other auctions across the country to expand their locations to meet fleet needs.

"By using independent auctions, we can fill in the gaps where we don't have locations to remarket cars for our national accounts," says McDevitt. "Currently we have about 40 affiliated auction locations and we can increase that number at any time."

The process for remarketing a fleet vehicle can be handled from start to finish by an auction. The first step is consignment of the vehicle by the fleet manager, which can be done by either phone or fax. Most auctions then assign an account executive to work closely with the fleet manager. After the vehicle is delivered to the auction, the account executive and the fleet manager usually discuss reconditioning and decide which repairs will be made to the vehicle prior to sale. Many auctions also help establish the selling price for the vehicle. After the vehicle is sold and upon receipt of the title, the auction sends a check for the proceeds of the sale to the fleet.

Also, auctions can help fleets comply with various regulations involved with remarketing. "Auctions have mastered administrative details of local and state regulations," says McDevitt. "In addition, auctions have clerical staffs that are knowledgeable and make sure the sellers stay in compliance with the regulations. They send all the required paperwork along with the check."

Don't Forget Employees

The average percentage of cars sold by fleets to employees is 25 percent, according to a study conducted by the National Association of Fleet Administrators. In addition, these same studies have shown that selling used fleet units to employees is the most profitable method of vehicle disposal. After all, employees are the most familiar with a company's vehicles and will pay a good price for a clean, well-kept unit.

"Employee sales are our first consideration in vehicle remarketing because employees often pay more money for the car," says Richard Saqui, national fleet supervisor, Field Service Division, General Systems Sector for Motorola. "They know that the car has been well-maintained and is a sound investment. Also, they have an emotional attachment to the car. When we sell cars in the used-car market, we normally don't get as high a return as we do through employee sales."

Most companies offer used vehicles to employees based on figures published in used-car pricing guides. In addition, factors such as mileage, condition, and extra-cost options are figured into the final price. Some companies also make available limited service warranties that accompany the used fleet vehicle after purchase.

Trade-Ins for New Models

Both franchised new-car dealers and used-car retailers need good sources of saleable vehicles to satisfy retail demand. Oftentimes, low-mileage fleet cars are appealing to these dealers for retailing. Some fleets, particularly small fleets, can use this to their advantage and work with a local dealer to remarket fleet units.

The major difference between owned and leased fleets is that company-owned fleets search for alternative methods of disposal, avoiding a trade-in when possible. In fact, 17 percent of company-owned fleets cite trade-ins as their most frequent-

Most Frequently Used Method of Vehicle Disposal

Method	Company-Owned	Company-Leased	Combined Totals
Return to lessor	3%	47%	26%
Sell to employee	25%	21%	23%
Auction	20%	19%	19%
Trade in	17%	4%	10%
Sell directly to public	14%	4%	9%
Sell to wholesaler	10%	4%	7%
Sealed bid auction	11%	1%	6%

**Source: Runzheimer International*

Bob McDevitt, vice president sales and marketing, Anglo American Auto Auctions

> *"Auto auctions are the fairest method of vehicle remarketing because of competitive bidding. During the auction process, used cars seek the level of their true worth."*

Most Financially Rewarding Method Of Vehicle Disposal

Method	Company-Owned	Company-Leased	Combined Totals
Sell to employees	32%	51%	41%
Sell directly to public	24%	11%	17%
Return to lessor	1%	22%	12%
Auction	13%	9%	11%
Trade in	12%	3%	7%
Sealed bids	14%	1%	8%
Sell to wholesaler	4%	3%	4%

**Source: Runzheimer International*

ly used method of vehicle disposal. In addition, company-owned fleets tend to use sealed bids as a means of disposal more often than company-leased fleets.

> *"Employee sales are our first consideration in vehicle remarketing because employees often pay more money for the car. They know that the car has been well-maintained and is a sound investment. Also, they have an emotional attachment to the car."*
>
> *—Richard Saqui*
> *Motorola*

Lessees Prefer Returns

According to Runzheimer International studies, returning cars to lessors is the most frequently used method of vehicle disposal among leased fleets (66 percent).

"One of the benefits of leasing is the ability of lessors to remarket cars," says Chuck Mayo, vice president of vehicle sales for United States Fleet Leasing. "Most companies are not selling vehicles day in and day out. Therefore, it's hard for them to stay up to date on all current used-car markets around the country. If they want to streamline operations, they need to look at the remarketing aspects of lessors."

Wholesalers Offer Quick Pick Up

Wholesalers are dealers who primarily buy from fleets and sell to dealers rather than to the public. In the past 15 years, the wholesaler has become a significant outlet for used fleet vehicles.

Wholesalers provide many of the same advantages that retail dealers do. These include quick pick up and sale of the vehicle and internal costs that may be lower than those of auctions or retail dealers. "When a fleet calls a wholesaler, the pick up is done within 24 hours," says Steve Rosenfeld, vice president, Bergen Auto Wholesalers of Astoria, NY. "We don't charge for selling the vehicle and we pay the company for the vehicle with a certified check within 24 hours of pick up."

Bergen Auto Wholesalers has 20 locations nationwide and annually sells between 3,000 and 4,000 vehicles, according to Rosenfeld. "Most of our business, 98 percent, is fleet cars," says Rosenfeld. "But we also deal with fleet trucks and equipment."

One advantage cited by Rosenfeld for using wholesalers is the convenience they offer.

"When a fleet wants to dispose of a vehicle, we can pick up that car at anytime, even at night," says Rosenfeld. "In addition, a fleet can be assured that we are qualified to transport cars because all of our drivers are licensed and bonded to do the job."

Another advantage is that wholesalers often are willing to pay competitive prices for used fleet units. "Wholesalers pay higher prices because they have a need for the vehicle," says Saqui. "Rather than taking a chance of sending the car through the bidding process at an auction, we try wholesalers first."

Weighing Your Options

Before selecting a remarketing avenue for used fleet units, consider a number of factors involved with used-car marketing. First, ask the question: "How much administrative work do I want to put into remarketing?" The answer should narrow the choices down. For example, if employee sales becomes too burdensome administratively, other methods might be more beneficial, such as trade-ins or wholesalers.

Next, analyze the used-car market in your area. Certain car models sell better in specific parts of the country. If your fleet has vehicles that will sell better elsewhere, auctions should be considered.

Also, time is money when it comes to remarketing. If a company likes to dispose of fleet units quickly, wholesalers are a strong option.

Finally, analyze which remarketing method will produce a higher bottom line and recoup costs, which is the overall objective of used-vehicle remarketing. AF

Fleets Extending Recycling Periods

The National Association of Fleet Administrators' 1990 Used Vehicle Marketing Survey represents the strategies of various industries which report that vehicles are kept an average of eight months longer than specified by fleets two years ago.

American fleets continue to utilize the traditional methods for used vehicle marketing — auto auctions again were the first choice for vehicle remarketing, with employee sales registering a distant second, according to the latest study by the National Association of Fleet Administrators (NAFA). Conducted among 133 U.S. fleets representing 115,326 managed vehicles, the survey sought to discover the developing trends in this increasingly important aspect of fleet management.

Respondents represented more than a dozen different industries and were responsible for the 1989 calendar-year sale of 11,819 automobiles, 3,569 vans, and 3,028 light-duty trucks from the 1987-89 model-years.

The resale age and mileage of vehicles increased from the 1988 survey. In 1988, vehicles averaged 32 months and 64,540 miles before being turned in for resale. Broken out by type of vehicle for those sold in 1989, autos averaged 40 months and 73,980 miles, for vans, 56 months and 73,120 miles, and for light-duty trucks, 68 months and 72,483 miles. To determine selling prices, 43 percent of fleet managers use a leasing company estimate, up

Average Number of Months and Miles on Each Types of Vehicle Sold in 1989

	Months	Miles
Autos	40	73,980
Vans	56	73,120
Light-Duty Trucks	68	72,483

How Many of Each Type of Vehicle was Sold Through Each Method in 1989?

	Autos					Vans					Light-Duty Trucks				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Banking/Finance	193	174	19	0	2	0	23	0	0	0	0	0	0	0	0
Chemicals & Petroleum	45	51	17	0	111	101	113	106	101	100	106	30	102	43	121
Communications	64	0	6	0	0	0	0	0	0	0	0	0	30	0	0
Consumer Mfg.	387	494	191	7	0	41	37	8	3	0	3	12	0	0	0
Drugs & Cosmetics	576	1,446	725	9	0	110	106	99	100	99	101	108	99	99	99
Electronics	156	264	0	0	0	75	177	0	0	0	0	0	0	0	0
Food & Beverage	394	611	395	11	0	12	0	106	0	0	5	2	54	0	0
Gov't./Law Enf.	380	3,505	699	101	20	112	523	100	3	0	73	777	60	2	0
Insurance	403	439	441	186	45	2	0	2	0	10	1	2	0	0	0
Industrial Mfg.	288	169	338	0	7	85	55	161	0	0	139	24	85	0	10
Public Utility	551	852	26	0	1	143	191	14	2	25	662	753	37	3	121
Service Org.	0	207	329	0	0	29	32	26	0	0	0	28	0	0	0
Other	541	765	66	49	31	12	58	0	0	2	61	246	1	18	43
Total U.S.	**4,068**	**8,982**	**3,252**	**418**	**217**	**722**	**1,315**	**622**	**209**	**236**	**1,151**	**1,982**	**468**	**165**	**394**

1 = Employees, 2 = Auctions, 3 = Wholesalers, 4 = New-Car Dealers, 5 = Used-Car Dealers

from 18.1 percent in the 1988 study. The next most popular method, *Automotive Market Report*, dropped from 53.6 percent to 34 percent this year. "What we are seeing here is simply a reliance on a different source for the same information," says Clyde Hillwig, publisher and editor of the *Automotive Market Report*. "Our circulation hasn't dropped at all, and the majority of leasing companies subscribe to our report on magnetic tape and put it on-line for fleet managers to access. As more fleet managers work with leasing companies, it is easier for them to get the information this way."

Actual Written Replacement Policies for Each Types of Vehicle in Fleet

	Months	Miles
Autos	42	63,100
Vans	54	71,500
Light-Duty Trucks	62	75,600

When asked what percentage of the original price fleet managers recovered from their remarketed automobiles, 35 percent said that they received 30-40 percent return on investment; 22 percent said that they received 20-30 percent for vans; and 39 percent got 20-30 percent return for light trucks. This data is new information not covered in previous surveys.

According to the *Automotive Lease Guide*, this is consistent with the 35-37 percent return (on MSRP) typically received on remarketed lease cars, which is a significant drop from the 40-50 percent return earned in the early 1980s. "If this trend continues," says Doug Aiken, publisher of *Automotive Lease Guide*, "it's con-

Frequency Vehicles are Reconditioned Before Being Sold

	Always	Often	Sometimes	Rarely	Never
Banking/Finance	0	0	0	0	100%
Chemicals & Petroleum	0	0	11%	35%	56%
Communications	0	0	0	100%	0
Consumer Manufacturing	0	0	50%	0	50%
Drugs & Cosmetics	0	20%	30%	50%	0
Electronics	0	0	0	0	100%
Food & Beverage	0	10%	40%	30%	20%
Govt./Law Enforcement	4%	21%	14%	25%	36%
Insurance	0	6%	38%	25%	31%
Industrial Manufacturing	0	0	13%	62%	25%
Public Utility	6%	6%	28%	22%	38%
Service Organization	0	0	67%	0	33%
Other	0	0	6%	50%	44%
Total	**2%**	**8 %**	**23 %**	**31%**	**36%**

Average Reconditioning Expense per Vehicle

	PERCENTAGES					
	$0	Less than $100	$101-$300	$301-$500	$501-$700	More than $700
Banking/Finance	100%	0	0	0	0	0
Chemicals & Petroleum	56%	33%	0	0	11%	0
Communications	0	100%	0	0	0	0
Consumer Manufacturing	40%	20%	40%	0	0	0
Drugs & Cosmetics	0	25%	62%	0	0	13%
Electronics	50%	0	0	50%	0	0
Food & Beverage	50%	10%	10%	20%	0	10%
Govt./Law Enforcement	38%	35%	19%	8%	0	0
Insurance	31%	31%	32%	0	6%	0
Industrial Manufacturing	38%	37%	0	25%	0	0
Public Utility	36%	32%	32%	0	0	0
Service Organization	100%	0	0	0	0	0
Other	54%	33%	13%	0	0	0
Total	**39%**	**30%**	**21%**	**6%**	**2%**	**2%**

Number of Responding Fleets

Industry Classification	
Banking/Finance	3
Chemicals & Petroleum	9
Communications	2
Consumer Manufacturing	6
Drugs & Cosmetics	10
Electronics	2
Food & Beverage	10
Govt./Law Enforcement	29
Insurance	16
Industrial Manufacturing	8
Public Utility	19
Service Organization	3
Other	16
Total	**133**

Percentage of Original Price Recovered from the Sale of Each Type of Vehicle

	Less than 10%	10-20%	20-30%	30-40%	40-50%	50-60%	60% and over
Banking/Finance	100	0	0	0	0	0	0
Chemicals & Petroleum	25	50	0	25	0	0	0
Communications	0	100	0	0	0	0	0
Consumer Mfg.	0	0	0	17	83	0	0
Drugs & Cosmetics	0	0	0	57	43	0	0
Electronics	0	0	0	0	100	0	0
Food & Beverage	0	0	17	50	33	0	0
Gov't./Law Enf.	5	26	38	21	0	5	5
Insurance	0	0	0	40	20	30	10
Industrial Mfg.	0	0	0	50	50	0	0
Public Utility	0	46	18	27	9	0	0
Service Org.	50	0	50	0	0	0	0
Other	0	9	9	64	18	0	0
Total Automobiles	**5**	**17**	**14**	**35**	**21**	**6**	**2**
Banking/Finance	0	0	0	0	0	0	0
Chemicals & Petroleum	50	0	0	50	0	0	0
Communications	0	0	0	0	0	0	0
Consumer Mfg.	0	0	0	0	50	50	0
Drugs & Cosmetics	0	0	0	0	0	0	0
Electronics	0	0	0	0	0	0	100
Food & Beverage	0	33	33	0	0	34	0
Gov't./Law Enf.	0	29	21	29	7	7	7
Insurance	0	0	50	0	0	0	50
Industrial Mfg.	0	0	33	0	33	0	34
Public Utility	11	33	34	22	0	0	0
Service Org.	50	50	0	0	0	0	0
Other	14	0	14	14	29	0	29
Total Vans	**9**	**20**	**22**	**18**	**11**	**7**	**13**
Banking/Finance	0	0	0	0	0	0	0
Chemicals & Petroleum	0	0	75	0	25	0	0
Communications	100	0	0	0	0	0	0
Consumer Mfg.	0	50	0	0	50	0	0
Drugs & Cosmetics	0	0	0	0	0	0	0
Electronics	0	0	0	0	0	0	0
Food & Beverage	0	0	0	100	0	0	0
Gov't./Law Enf.	0	13	55	13	13	0	6
Insurance	0	0	100	0	0	0	0
Industrial Mfg.	33	0	33	0	34	0	0
Public Utility	0	40	30	30	0	0	0
Service Org.	100	0	0	0	0	0	0
Other	17	0	17	33	33	0	0
Total Light-Duty Trucks	**9**	**16**	**39**	**18**	**16**	**0**	**2**

ceivable that it may drop to 33 percent in 1994 for a higher cost vehicle. So your actual dollar depreciation is going to escalate."

As is typical, 36 percent of responding fleet managers say that they "never" recondition vehicles before sale; 31 percent responded that they "rarely" recondition; 23 percent "sometimes" recondition; and eight percent recondition "often." Only two percent say that they "always" recondition. Of the fleet managers who do recondition, 30 percent say that they spend less than $100. Twenty-one percent say that they spend between $101 and $300, while six percent spend between $301 and $500. Two percent said that they spend between $501 and $700, and another two percent spend more than $700.

Changes cited by fleet managers for the coming year include the selection of option packages, for which 32 percent said they planned to order differently, in the hopes of increasing resale returns. "Of course, loaded cars bring more at auction," says Pete Lukasiak, executive director of the National Auto Auction Association. "I believe that part of what you see in regards to this study is that manufacturers are finally responding to what fleet managers want." Lukasiak believes that fleet managers may be changing the options they order because of the greater availability of free-flow options. "If you look at auction guidebooks, automatic transmissions and air conditioning aren't even listed as options anymore," he says. "At last year's NAFA convention, GM Chairman Robert Stempel literally received a standing ovation when he told the crowd that GM planned to change and offer more free-flow options to fleets." AF

Top 100

'91 Rank	'90 Rank	Company Name & Headquarters	Fleet Contact	Co. Owned	Lessor(s)	# Cars	# Trucks & Vans	Total
1	1	Federal Express Corp. Memphis, TN	Jim Gwinner	X	Fleetmark, ARI	90	24,316	24,406
2	2	Quality Bakers America Greenwich, CT	David I. Armstrong	X	—	2,900	17,000	19,900
3	3	Sears, Roebuck & Co. Chicago, IL	William H. Jones III	X	—	91	15,006	15,097
4	4	Xerox Corp. Rochester, NY	Ron Pink	—	LMV	6,000	9,000	15,000
5	6	Digital Equipment Corp. Maynard, MA	Frank Perry	—	PHH, GEC Fleet	11,450	600	12,050
6	5	Frito-Lay, Inc. Dallas, TX	Tom Smith	X	—	700	11,000	11,700
7	7	State Farm Insurance Co. Bloomington, IL	Thomas D. Sours	X	—	11,160	327	11,487
8	11	Eastman Kodak Co. Rochester, NY	Mark Hardway	X	PHH	7,639	1,718	9,357
9	8	Continental Baking Co. St. Louis, MO	Paul J. Walsh J.L. Eber	X	—	400	8,868	9,268
10	10	ARA Services, Inc. Philadelphia, PA	Ralph Jamic	X	GEC Fleet	2,860	5,885	8,745
11	12	Chesapeake & Potomac Silver Spring, MD	James Boles	—	Metlife	2,222	6,142	8,364
12	98	Hewlett-Packard Co. N. Hollywood, CA	Craig Kundrotas	X	—	7,165	108	7,273
13	14	Minnesota Mining & Manufacturing St. Paul, MN	R.A. (Dick) Martinson	X	—	5,744	1,525	7,269
14	24	Borden, Inc. Columbus, OH	Al Botbyl (Dairy) Bill Talmadge (Pkg) Frank Smepak (Snacks) Jim Pryor (Groceries)	X	Beafinser, Bank Amerilease, Ryder	1,090	6,085	7,175
15	13	Tupperware Home Parties Orlando, FL	John Bandy Jim Metcalf	—	Wheels	7,000	0	7,000

STATISTICS

'91 Rank	'90 Rank	Company Name & Headquarters	Fleet Contact	Co. Owned	Lessor(s)	# Cars	# Trucks & Vans	Total
16	16	Honeywell, Inc. Minneapolis, MN	Mike Robinson	—	GEC Fleet, PHH	4,282	2,550	6,832
17	89	Service Corp. Int'l Stamford, CT	Allen Bellatoni Gary Sanders (Houston)	X	Wheels, PHH	2,405	4,151	6,556
18	18	Motorola, Inc. Schaumburg, IL	J. Baxter (C&E) R. Saqui (Gen Sys) P. Burgeson (Codex) N. Johnson (SPS)	X	—	4,800	1,700	6,500
19	21	Shell Oil Co. Houston, TX	Doug Wildman Larry Leverett	X	ARI	1,953	4,484	6,437
20	34	Dow Chemical U.S.A. Midland, MI	Tom Madden Sue Soper	—	McCullagh, GEC Fleet, Wheels	3,691	2,464	6,155
21	15	Ashland Oil, Inc. Ashland, KY	William D. Bloss Ron L. Chapman	X	PHH, GEC Fleet, BLC Corp.	1,800	4,191	5,991
22	64	Texaco Inc. White Plains, NY	Art Fritz	—	PHH	1,925	3,575	5,500
23	31	E.I. DuPont de Nemours & Co. Wilmington, DE	Richard G. Prettyman	—	PHH	3,228	2,258	5,486
24	23	Interstate Brands Corp. Kansas City, MO	Gary Pasche	X	—	290	5,190	5,480
25	27	Mary Kay Cosmetics Dallas, TX	Steve Morton	—	ARI	5,398	0	5,398
26	26	Exxon Co. USA Houston, TX	John Dewees Jim Caldwell	X	ARI	1,900	3,300	5,200
27	179	Chemlawn Columbus, OH	Ken Cheverko	X	BLC Truck Leasing, Triathalon	234	4,848	5,082
28	28	Goodyear Tire & Rubber Co. Akron, OH	George Platis	X	PHH	1,517	3,542	5,059
29	29	Smith Kline Beecham Philadelphia, PA	Sandi Nicotera	—	Wheels, PHH	4,600	400	5,000
30	20	Westinghouse Electric Corp. Pittsburgh, PA	Lou Dobak	X	PHH, GEC Fleet, LMV	3,000	2,000	5,000
31	25	Campbell Taggart, Inc. Dallas, TX	Ray Grzywinski	X	Penske	700	4,200	4,900

STATISTICS

'91 Rank	'90 Rank	Company Name & Headquarters	Fleet Contact	Co. Owned	Lessor(s)	# Cars	# Trucks & Vans	Total
32	44	Amoco Corp. Chicago, IL	Richard Lynch	X	—	1,200	3,675	4,875
33	45	Rollins, Inc. Atlanta, GA	John Willis	—	B&M, World Omni	750	3,671	4,421
34	41	TW Services Spartanburg, SC	Helen Cook	X	ARI	1,100	3,200	4,300
35	36	Aetna Life & Casualty Hartford, CT	Martin F. Crean	—	Wheels	4,139	146	4,285
36	54	Merck & Co., Inc. Rahway, NJ	Art Welton	X	PHH	3,949	163	4,112
37	84	VPSI Troy, MI	Stephen D. Grafe	X	—	107	3,930	4,037
38	38	Philip Morris USA New York, NY	Gregory Tarring Janice Groele	—	PHH, GEC Fleet	1,000	3,000	4,000
39	82	Terminix, Inc. Memphis, TN	Andy Gunnell	—	Wheels	850	3,000	3,850
40	50	CSX Transportation Jacksonville, FL	Jim Fronckoski	X	ARI, Bank Amerilease	295	3,530	3,825
41	49	ADT Security Systems Parsippany, NJ	John Africano	X	GEC Fleet	900	2,900	3,800
42	42	American Home Products New York, NY	Elizabeth Witkowski	—	Wheels	3,700	100	3,800
43	39	Union Carbide, Corp. Dansbury, CT	Fred Glantzberg	—	Wheels, ARI	3,400	400	3,800
44	55	Crawford & Company Atlanta, GA	Wanda Ellison	—	B&M Equipment Leasing	3,600	125	3,725
45	46	Travelers Companions Hartford, CT	Patrick O'Sweeney	—	PHH	3,573	117	3,690
46	48	Phillips Petroleum Co. Bartlesville, OK	James I. Grillot Gary R. Harrington	X	—	692	2,926	3,618
47	43	Procter & Gamble Cincinnati, OH	Clarence O'Dell	X	—	3,600	0	3,600
48	37	R.J. Reynolds Tobacco Co. Winston-Salem, NC	Larry Giddens	—	PHH	1,500	2,000	3,500

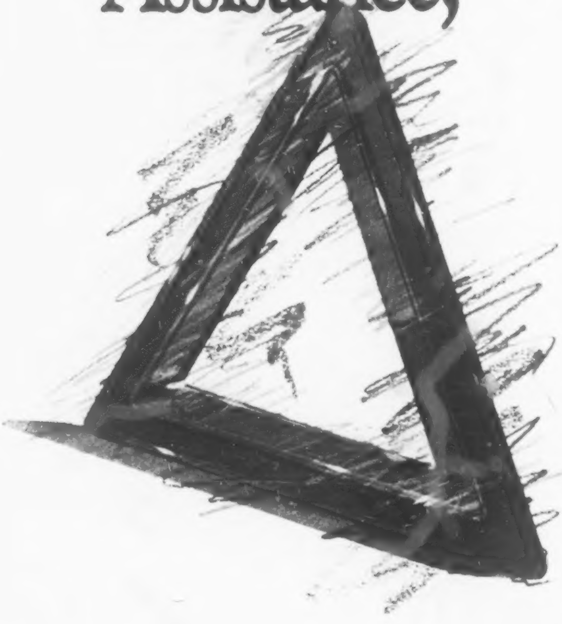
STATISTICS

'91 Rank	'90 Rank	Company Name & Headquarters	Fleet Contact	Co. Owned	Lessor(s)	# Cars	# Trucks & Vans	Total
49	32	Tenneco Inc. Houston, TX	Tiny Robertson	X	—	400	3,000	3,400
50	33	Service America Corp. Stamford, CT	Wilber O. Wachter	X	PHH, Wheels	893	2,500	3,393
51	63	Nabisco Brands, USA East Hanover, NJ	Bill Kittle	—	PHH	2,180	1,200	3,380
52	102	McKesson Corp. San Francisco, CA	Beverly Heim	—	USFL	1,241	2,131	3,372
53	51	Norfolk Southern Roanoke, VA	Sam Hammett	X	—	834	2,491	3,325
54	67	Marathon Oil Co. Houston, TX	Liz Nikel	X	PHH, Wheels	820	2,480	3,300
55	59	Revlon, Inc. Edison, NJ	Kathy Poppe	—	GEC Fleet	3,230	35	3,265
56	56	Burlington Northern Railroad St. Paul, MN	John Long	X	—	650	2,600	3,250
57	70	Farmers Insurance Group Los Angeles, CA	Gene Grembowski	X	—	3,061	97	3,158
58	62	General Electric Med. Sys. Waukesha, WI	Ed Todl	—	GEC Fleet	1,640	1,510	3,150
59	65	Johnson Controls, Inc. Milwaukee, WI	Bob Borchert	—	GEC Fleet, Southgate, Wheels	260	2,830	3,090
60	52	General Electric ConsumerService Louisville, KY	Philip Schilling	X	GEC Fleet	0	3,018	3,018
61	66	North American Phillips Corp. New York, NY	Marina Alexiou	X	ARI	3,000	3	3,003
62	—	Disney Enterprises Burbank, CA	Ben Reade Daniel Buek Darrell Albers	X	—	1,500	1,500	3,000
63	61	Kraft, Inc. Retail Food Group Glenview, IL	W.R. Roberts	—	GEC Fleet	3,000	0	3,000
64	53	Pfizer, Inc. New York, NY	Gordon B. West	X	Wheels, PHH	2,883	55	2,938

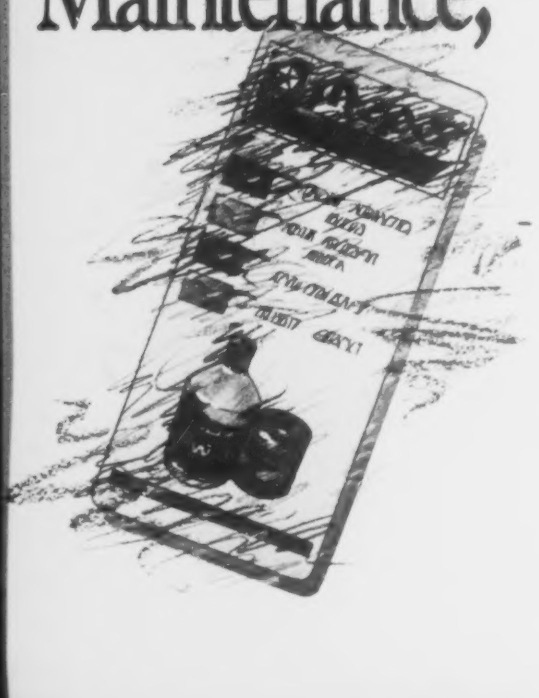
'91 Rank	'90 Rank	Company Name & Headquarters	Fleet Contact	Co. Owned	Lessor(s)	# Cars	# Trucks & Vans	Total
65	70	Greyhound Dial Corp. Phoenix, AZ	Pierce Walsh	—	PHH	1,875	1,005	2,880
66	72	Warner Lambert Co. Morris Plains, NJ	Ed Olesky	—	Wheels, PHH	2,835	0	2,835
67	57	General Electric Ind. & Pwr. Sys. Norcross, GA	Carmen Noakes	X	GEC Fleet	2,260	565	2,825
68	167	United Artists Denver, CO	Fran Spencer	X	—	150	2,650	2,800
69	77	McDonalds Corp. Oakbrook, IL	Susan Miller	X	—	2,669	46	2,715
70	73	ECOLAB Inc. St. Paul, MN	Jerry Rodewald	X	GEC Fleet	1,700	1,000	2,700
71	87	The Upjohn Co. Kalamazoo, MI	S. Levine J. Perry L. Webster	X	Wheels	2,100	580	2,680

Roadside Assistance,

Food And Lodging,



'91 Rank	'90 Rank	Company Name & Headquarters	Fleet Contact	Co. Owned	Lessor(s)	# Cars	# Trucks & Vans	Total
72	96	Abbott Laboratories Abbott Park, IL	Rich Derreberry	—	Wheels, PHH, GEC Fleet	2,480	150	2,630
73	80	Keebler Co. Elmhurst, IL	William Stanley	—	GEC Fleet, Wheels, Emkay	2,050	550	2,600
74	81	Whitman Corp. Chicago, IL	Geraldine Marquart	—	GEC Fleet	1,900	700	2,600
75	94	Bristol-Myers USPNG Evansville, IN	Steve Vandever	—	PHH, Wheels	2,304	272	2,576
76	165	National Linen Service Atlanta, GA	Tom Spight	X	—	125	2,441	2,566
77	58	Cox Enterprises Atlanta, GA	Patsy Brownson	X	ARI, Wheels	416	2,113	2,529
78	—	Union Pacific Systems Omaha, NE	Jerry Covey	X	GEC Fleet	568	1,950	2,518



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STATISTICS

'91 Rank	'90 Rank	Company Name & Headquarters	Fleet Contact	Co. Owned	Lessor(s)	# Cars	# Trucks & Vans	Total
79	93	Cigna Corp. Philadelphia, PA	Tina Kourakos	X	PHH	2,400	100	2,500
80	91	Textron, Inc. Providence, RI	Howard Maurer	X	PHH	1,800	600	2,400
81	—	DHL Airways Redwood City, CA	Rick Marquette O.J. Plotner	X	ARI, GEC Fleet	0	2,400	2,400
82	110	Baxter Healthcare Corp. Deerfield, IL	Patrick Sheehan	—	Wheels, GEC Fleet	1,600	800	2,400
83	92	PPG Industries Pittsburgh, PA	Debbie Durick	X	GEC Fleet	1,328	1,066	2,394
84	—	Teledyne, Inc. Los Angeles, CA	Jim Stockwell	X	—	1,900	400	2,300
85	106	Eli Lilly & Co. Indianapolis, IN	Hal Olsen Sue Webster Rita Rogers	—	Wheels	2,037	213	2,250
86	100	Nationwide Insurance Co. Columbus, OH	Gail Royer	—	Wheels	2,185	35	2,220
87	90	ITT Hartford Hartford, CT	Diane Brittell	—	PHH	2,114	94	2,208
88	79	Diebold Inc. Canton, OH	Linda Taylor	—	PHH	600	1,600	2,200
89	119	Shaklee Corp. San Francisco, CA	Janice Williamson	—	In-house	2,000	150	2,150
90	—	Enron Corp. Houston, TX	Don Conant	X	PHH, ARI	400	1,700	2,100
91	123	USF&G Insurance Baltimore, MD	James Myers	X	—	2,056	15	2,071
92	113	Fleming Companies, Inc. Oklahoma City, OK	Wayne Lankford	—	USFL	1,449	552	2,001
93	60	Hoffmann-LaRoche Nutley, NJ	Denise Gizzo	X	PHH, Wheels	1,700	300	2,000
94	71	Ogden Allied Service Corp. New York City, NY	Joe Smith	X	—	650	1,300	1,950
95	95	Hoechst Celanese Somerville, NJ	Bruce Winter Isabel Bogusz	—	Wheels	1,538	390	1,928

STATISTICS

'91 Rank	'90 Rank	Company Name & Headquarters	Fleet Contact	Co. Owned	Lessor(s)	# Cars	# Trucks & Vans	Total
96	121	Pony Express Courier Corp. Charlotte, NC	William Glasheen	—	Associates	80	1,847	1,927
97	122	Brown & Williamson Tobacco Corp. Louisville, KY	Charles M. (Mike) Cooley	X	—	632	1,281	1,913
98	126	Asea Brown Boveri Windsor, CT	Donald LePard	—	ARI, McCullagh	1,500	400	1,900
99	85	American Building Maintenance San Francisco, CA	Ellie Walsh	—	PHH	1,000	900	1,900
100	78	Sherwin-Williams Co. Cleveland, OH	David Hall Mike Novicki	—	Wheels, McCullagh	900	1,000	1,900
Totals						227,698	245,931	473,629

Automotive Fleet's Top 100

Alphabetical Cross Reference

Company Name	Rank
Abbott Laboratories	72
ADT Security Systems	41
Aetna Life & Casualty	35
American Building Maintenance	99
American Home Products	42
Amoco Corp	32
ARA Services, Inc	10
Asea Brown Boveri	98
Ashland Oil, Inc	21
Baxter Healthcare Corp	82
Borden, Inc.	14
Bristol-Myers USPNG	75
Brown & Williamson Tobacco Corp	97
Burlington Northern Railroad	56
Campbell Taggart, Inc	31
Chemlawn	27
Chesapeake & Potomac	11
Cigna Corp	79
Continental Baking Co	9
Cox Enterprises	77
Crawford & Company	44
CSX Transportation	40
DHL Airways	81
Diebold Inc	88
Digital Equipment Corp	5
Disney Enterprises	62
Dow Chemical U.S.A.	20
E.I. DuPont de Nemours & Co	23
Eastman Kodak Co	8
ECOLAB Inc	70
Eli Lilly & Co	85
Enron Corp	90
Exxon Co. USA	26
Farmers Insurance Group	57
Federal Express Corp	1
Fleming Companies, Inc	92
Frito-Lay, Inc	6
General Electric Consumer Service	60
General Electric Ind. & Pwr. Sys	67
General Electric Med. Sys	58
Goodyear Tire & Rubber Co	28
Greyhound Dial Corp	65
Hewlett-Packard Co	12
Hoechst Celanese	95
Hoffmann-LaRoche.	93
Honeywell, Inc.	16
Interstate Brands Corp	24
ITT Hartford	87
Johnson Controls, Inc	59
Keebler Co	73
Kraft, Inc. Retail Food Group	63
Marathon Oil Co	54
Mary Kay Cosmetics	25
McDonalds Corp	69
McKesson Corp	52
Merck & Co., Inc	36
Minnesota Mining & Manufacturing	13
Motorola, Inc	18
Nabisco Brands, USA	51
National Linen Service	76
Nationwide Insurance Co	86
Norfolk Southern	53
North American Phillips Corp	61
Ogden Allied Service Corp	94
Pfizer, Inc.	64
Philip Morris USA	38
Phillips Petroleum Co	46
Pony Express Courier Corp	96
PPG Industries	83
Procter & Gamble	47
Quality Bakers America	2
R.J. Reynolds Tobacco Co	8
Revlon, Inc	55
Rollins, Inc	33
Sears, Roebuck & Co	3
Service America Corp	50
Service Corp. Int'l	17
Shaklee Corp	89
Shell Oil Co	19
Sherwin-Williams Co	100
Smith Kline Beecham	29
State Farm Insurance Co	7
Teledyne, Inc	84
Tenneco Inc	49
Terminix, Inc	39
Texaco Inc	22
Textron, Inc	80
Travelers Companions	45
Tupperware Home Parties	15
TW Services	34
Union Carbide, Corp	43
Union Pacific Systems	78
United Artists	68
Upjohn Co	71
USF&G Insurance	91
VPSI	37
Warner Lambert Co	66
Westinghouse Electric Corp	30
Whitman Corp	74
Xerox Corp	4

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A Look At Top-Selling Fleet Pickups

Light and medium trucks registered by fleets accounted for 13 percent of all truck registrations in the first eight months of 1990. For a closer look at the 1991 pickup market, outlined below are the industry's top-selling models.

American Isuzu

American Isuzu's largest selling fleet pickup, the Standard Bed with a 2.3-liter engine, now features a 3.1-liter V-6 engine as an option for 1991.

All Isuzu pickups offer a standard rear-wheel anti-lock brake system to prevent lock-up during panic stops. Other safety features on Isuzu pickups include four-wheel disc brakes, triple skid plates, and engine warning lamps. In addition, all Isuzus are covered by a 72-month corrosion warranty against rust-through.

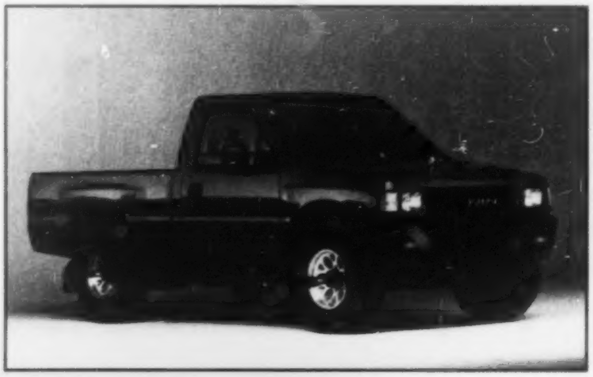
Standard features for the Standard Bed include tilt steering, double-wall cargo bed, halogen headlamps, and front vent windows. Features such as a rear step bumper, bedliner, and a convenience package with power windows and cruise control can be ordered as options.

Chevrolet

Chevrolet's C/K line of pickup trucks adds a new 7.4-liter V-8 engine and an electronically controlled heavy-duty four-speed automatic overdrive transmission in 1991.

Powertrain improvements on all 1991 C/K models include a new 220 Series throttle body injection system and SD 260 starter motor.

New equipment options available in 1991 on C/K pickups include a



The American Isuzu Standard Bed features a new 3.1-liter V-6 engine as an option in 1991.

Chevrolet's C/K pickup line adds a new, optional 7.4-liter V-8 engine for the 1991-model year.

Dodge's leading fleet pickup, the D150, comes standard with a 3.9-liter EFI V-6 engine. New features for 1991 include a redesigned rear bumper and tilt steering.

The F-150 pickup from Ford offers improved corrosion protection and an electronic four-speed overdrive transmission (E40D) in 1991. Also, new F-Series options include an electric shift transfer case on F-150 4x4 models.

The Sierra, GMC's top-selling fleet pickup, is equipped with 4.3-liter Vortec V-6 engine and independent front suspension. New options in 1991 are an under-the-rail bedliner and an analog instrument cluster with tachometer.

bedliner, tow hooks, high back, reclining front bucket seats, and gage cluster with tachometer.

In addition, a new-for-1991 model is the C3500 HD Series Chassis-Cab. This new model comes with a 5.7-liter V-8 standard engine or an optional 7.4-liter V-8.

Dodge

Dodge's leading fleet pickup, the D150, offers a standard 3.9-liter EFI V-6 engine mated to a five-speed manual overdrive transmission. Optional 5.2- and 5.7-liter engines are also available, as well as three-speed and four-speed automatic transmissions.

Dodge also offers a variety of GVW ratings and axle ratios, plus a choice of short wheelbase or long wheelbase models. Four-wheel-drive 150 and 250 Dodge Power Ram Pickups feature standard Ram-Trac shifting which allows drivers to go from two- to four-wheel drive on the fly.

New features for 1991 include a redesigned rear bumper for increased towing capacity, tilt steering, a new tailgate applique, and an optional GVW on the D150 Long Wheelbase model of 6,200 lbs.

The Dakota, another leading fleet pickup from Dodge, is available in two- or four-wheel drive in 1991 and offers a standard 3.9-liter EFI V-6 engine on 4x4 and Sport models. In addition, an optional V-8 engine is available.

Standard features for Dakota models include tinted windows, corrosion and anti-chip protection, rear anti-lock brakes, and a storage tray. A rear step bumper, power door locks, tachometer, and a 22-gallon fuel tank are available as options.

Pickup Fleet Registrations 1989 vs. 1990-Model Year

Make/Model	1989	1990
American Isuzu*		
Standard Bed	N/A	3,928
Chevrolet		
C/K Truck	32,026	41,614
S-10 Truck	10,369	8,895
R/V Truck	9,530	1,989
Dodge		
Ram 50	358	296
Dakota	6,719	4,107
D150/D250/D350	10,746	11,844
Ford		
Ranger	17,097	20,838
F-150/F-250/F-350	73,751	71,906
GMC*		
Sonoma (S-15)	3,383	2,362**
Sierra	15,598	13,380**
Mazda		
Pickup	5,478	4,336
Mitsubishi		
Mighty Max	46	45
Nissan		
Hardbody	8,972	9,078
Toyota		
4x2 Pickup	12,262	7,992
4x4 Pickup	4,988	3,159

* Calendar Year figures

** Through October 1990

Ford

The F-150 pickup continues to be Ford's leading fleet seller. For 1991, all Ford F-Series trucks come with greater corrosion protection and availability of an electronic four-speed overdrive transmission (E4OD).

Improved corrosion protection is achieved through increased use of two-sided galvanized steel for the hood, tailgate, dash panels, and doors.

E4OD availability for 1991 includes models powered by the Ford 5.0-liter EFI V-8 engine. The E4OD was first introduced on F-Series trucks in the 1989-model year.

New F-Series options for 1991 include a bodyside two-tone paint on regular and SuperCab models, "Touch Drive" electric shift transfer case on F-150 4x4 models, and lower accent two-tone paint on F-150 XLT Lariat models.

A tachometer is standard on top-of-the-line F-Series XLT Lariat trucks and automatic hub locks will become standard equipment on F-250/350 4x4 models during the 1991-model year.

GMC

The Sierra leads GMC Truck's fleet lineup for 1991. Selling more than 13,000 fleet units in the 1990 calendar year, the Sierra is equipped with a 4.3-liter Vortec V-6 engine with electronic fuel injection (1500 and 2500 series and models below 8,600 lbs. GVW); five-speed manual transmission with overdrive; independent front suspension, shift-on-the-fly Insta-Trac 4WD system on 4x4 models, and a rear-wheel anti-lock brake system.

New options available for 1991 include an under-the-rail GM Duraliner bedliner on wideside Sierras, both the 6.5-foot and 8-foot boxes, and an analog instrument cluster with tachometer.

Coming in mid-1991 is an optional high-back bucket seat offered on regular cab Sierras in place of the current low-back bucket seat. Club Coupe models will still receive current low-back seats when bucket seats are ordered.

Also new for 1991 from GMC is the Class 4 Sierra 3500 HD with wheelbase offerings of 135.5, 159.5, and 183.5 inches.

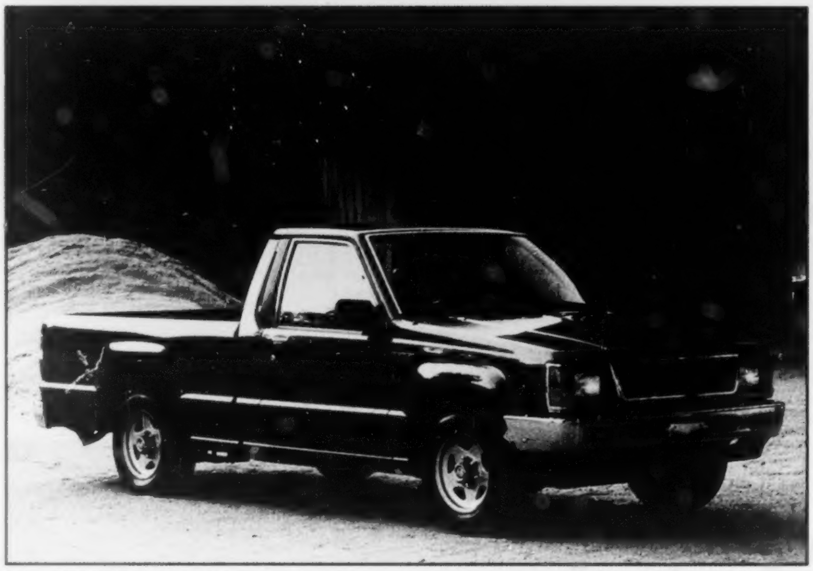
The Sierra cab and chassis lineup for 1991 includes two- and four-wheel-drive 3500 series chassis-cab models with ratings up to 12,000-lb. GVWR. The long wheelbase, Heavy-Hauler commercial 3500 series chassis-cab version is offered with the 10,000-lb. and 11,000-lb. GVWR for two-wheel drive versions and 10,000-lb. and 12,000-lb. GVWR for four-wheel-drive models.

Mazda

Mazda's B2200 and B2600i pickups are available in 4x2 and 4x4 models in Regular and Cab Plus versions. Two-wheel-drive models are powered by a 2.2-liter engine while four-wheel-drive versions come standard with a 2.6-liter engine.

All Mazda pickups are equipped with power-assisted front disc/rear drum brakes, and combined with standard rear-wheel anti-lock brakes provide quick, skid-resistant stops. In addition, Cab Plus models include a six-foot cargo bed and reclining bucket seats.

Mazda's B2200 and B2600i (shown above) pickups are equipped with power-assisted front disc/rear drum brakes and anti-lock braking systems. Three levels of equipment options also are available.



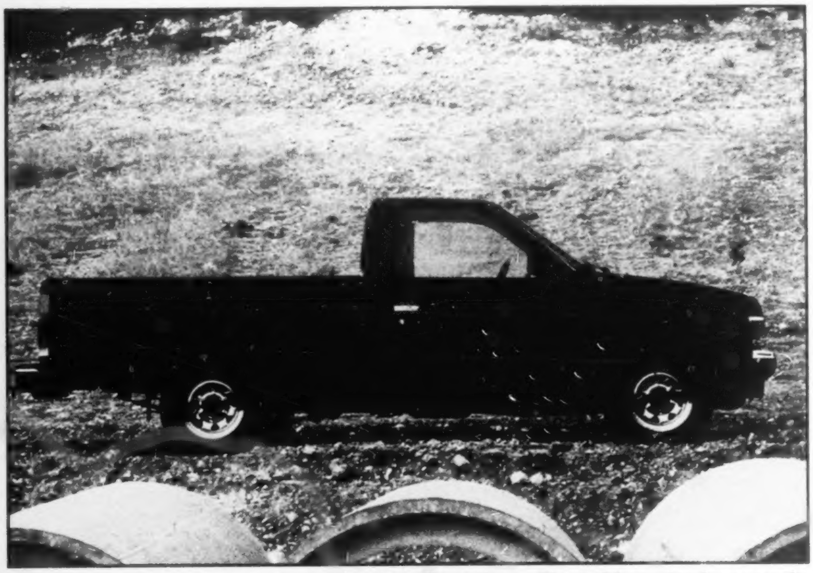
The 1991 Mitsubishi Mighty Max 2WD, above, features a 2.4-liter SOHC engine and standard features such as tilt steering and double-wall cargo box.

Three levels of optional equipment are available and come with such features as rear step bumper, intermittent wipers, tachometer, and dual sport-type mirrors.

Mitsubishi

The 1991 Mitsubishi Mighty Max is available in two-wheel-drive and four-wheel-drive configurations. The Mighty Max 2WD features a 2.4-liter SOHC engine, optional two-wheel anti-lock brakes, and a special edition trim package. The 4WD version carries a 3.0-liter V-6 engine and rear-wheel anti-lock brakes as standard equipment.

Mitsubishi offers Mighty Max 2WD versions in three models: Mighty Max, Mighty Max Macrocab, and Mighty Max One Ton. The special edition package for Mighty



Nissan's Hardbody comes in 4x2 and 4x4 configurations. The 4x2 has a towing capacity of up to 5,000 lbs., while the 4x4 can tow up to 3,500 lbs. and carry a payload of 1,400 lbs.

Toyota's Xtracab 2WD pickup, above, is powered by a 2.4-liter four-cylinder engine. A V-6 engine is available as an option. All 2WD models have an independent torsion bar front suspension and ABS on selected models.

Max and Mighty Max Macrocab comprises halogen headlights, front bumper, and tail lamp surround. Mighty Max and Mighty Max Macrocab offer a choice of five-speed manual gearbox or optional four-speed automatic transmissions while the Mighty Max One Ton has a five-speed gearbox only.

The Mighty Max 4WD comes with a part-time four-wheel-drive system which can be shifted from two- to four-wheel drive from the cab. A two-speed transfer case allows the driver to select high or low gears in four-wheel drive.

Standard features for all Mighty Max trucks include tilt steering wheel, double-wall cargo box, and cargo tie-down hooks.

Nissan

The 1991 Nissan Hardbody is available in 4x2 and 4x4 configurations and Regular Cab and King Cab body styles. The 4x2 Hardbody is fitted with a double-wall rust-resistant seamless cargo bed and has a towing capacity of up to 5,000 lbs., depending on the model. A five-speed manual overdrive transmission comes standard with a four-speed automatic available as an option. A 2.4-liter OHC four-cylinder engine comes standard on the 4x2 and 4x4 Regular Bed and King Cab versions, while a 3.0-liter OHC V-6 is standard on the Long Bed and SE-V-6 King Cab models.

The 4x4 Hardbody has a towing capacity of up to 3,500 lbs. and a payload of 1,400 lbs. For the 1991 model year, all Hardbody 4x4s come standard with a rear-wheel anti-lock braking system.

Toyota

Toyota's 2WD Pickup comes in Standard Bed, Long Bed, Xtracab, and One Ton models and is powered by a 2.4-liter four-cylinder engine with electronic fuel injection. A V-6 engine is available as an option.

All 2WD models employ an independent torsion bar front suspension and rear leaf-spring suspension. Toyota's rear-wheel anti-lock braking system is also available on all pickup models.

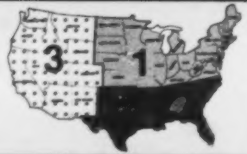
Payload ratings for the Toyota pickup range from 1,640 lbs. on Half Ton models to 2,510 lbs. on One Ton pickups.

Toyota 4WD trucks are designed for both on- and off-road use. Standard equipment on all 4WD models includes locking front hubs, skid plates to protect the transfer case and fuel tank, front end and rear guards, and a front tow hook.

Special optional feature packages for Toyota trucks include a power package with power windows, door locks, and dual power windows, a cruise control package, and a window package with sliding rear window and front cab vent windows. AF

USED-CAR PRICES

The following are average used-car prices for the period ending January 1, 1991. Prices are based on wholesale activity at major dealers across the country. They are divided into three zones as indicated on the accompanying map. These averages are calculated electronically. They are based on clean cars only. Proper allowance should be made for upgrading sharp cars and proper deduction taken for fair cars. Automatic transmissions have been included in the averages of all models. This information is published in *Automotive Fleet* by special permission of *Automotive Market Report.*

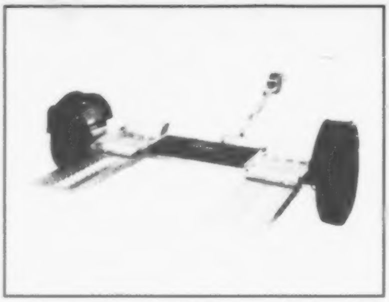


89 BUICK SKYHAWK			
Coupe	5,867	5,924	5,747
Sedan	5,947	6,008	5,829
88 BUICK SKYHAWK			
Coupe	4,874	4,923	4,775
Sedan	4,941	4,990	4,842
89 BUICK SKYLARK			
Cust Sedan	6,823	6,897	6,692
88 BUICK SKYLARK			
Cust Sedan	5,770	5,827	5,653
89 BUICK CENTURY			
Cust Sedan	7,119	7,190	6,977
88 BUICK CENTURY			
Cust Sedan	5,736	5,794	5,622
89 BUICK LESABRE			
Cust Sedan	9,198	9,290	9,014
88 BUICK LESABRE			
Cust Sedan	7,612	7,689	7,460
89 CADILLAC DEVILLE			
Coupe	15,440	15,594	15,132
Sedan	15,608	15,766	15,296
88 CADILLAC DEVILLE			
Coupe	12,219	12,340	11,974
Sedan	12,362	12,485	12,114
89 CADILLAC SEVILLE			
Sedan	15,606	15,763	15,293
88 CADILLAC SEVILLE			
Sedan	12,985	13,115	12,725
89 CHEVY BERETTA			
Coupe	6,732	6,801	6,598
89 CHEVY CORSICA			
Hatchback 4 dr.	6,415	6,480	6,287
88 CHEVY BERETTA			
Coupe	5,644	5,701	5,531
88 CHEVY CORSICA			
Sedan	3,968	4,008	3,888
89 CHEVY CAVALIER			
Sedan	5,507	5,563	5,397
88 CHEVY CAVALIER			
Sedan	4,582	4,629	4,490
89 CHEVY CELEBRITY			
Sedan	6,537	6,602	6,406
88 CHEVY CELEBRITY			
Sedan	5,180	5,232	5,078
89 CHEVY CAPRICE			
Sedan	7,378	7,451	7,229
88 CHEVY CAPRICE			
Sedan	5,983	6,044	5,865
89 CHRYSLER LE BARON			
Highline Sedan	6,642	6,708	6,507
88 CHRYSLER LE BARON			
Sedan	5,188	5,241	5,085
89 CHRYSLER NEW YORKER			
Sedan	10,469	10,574	10,261
88 CHRYSLER NEW YORKER			
Sedan	8,811	8,899	8,634
89 CHRYSLER FIFTH AVENUE			
Sedan	10,666	10,770	10,451
88 CHRYSLER FIFTH AVENUE			
Sedan	8,528	8,615	8,358
89 DODGE ARIES AMERICA			
Sedan	5,219	5,272	5,115
88 DODGE ARIES AMERICA			
Sedan	4,126	4,168	4,042
89 DODGE SHADOW			
Liftbk 5 Dr	5,535	5,590	5,423
88 DODGE SHADOW			
Liftbk 5 Dr	4,487	4,531	4,397
89 DODGE DYNASTY			
Sedan	7,947	8,027	7,787
89 FORD ESCORT			
Htchbk 4 Dr LX	4,827	4,875	4,730
88 FORD ESCORT			
Htchbk 4 Dr GL	3,759	3,797	3,684
89 FORD MUSTANG			
LX-4 Coupe	6,387	6,449	6,257
88 FORD MUSTANG			
LX-4 Coupe	5,256	5,309	5,151
89 FORD TEMPO			
GL Sedan 4 Dr	5,673	5,731	5,560
88 FORD TEMPO			
GL Sedan 4 Dr	4,634	4,680	4,541
89 FORD TAURUS			
GL Sedan 4 Dr	7,487	7,562	7,336
88 FORD TAURUS			
GL Sedan 4 Dr	5,982	6,044	5,863
89 FORD CROWN VICTORIA			
Sedan	9,838	9,936	9,641
88 FORD CROWN VICTORIA			
Sedan	8,014	8,094	7,852
89 THUNDERBIRD			
Coupe	8,865	8,953	8,687
88 THUNDERBIRD			
Coupe	7,231	7,303	7,086
89 LINCOLN			
Town Car Sedan	13,905	14,045	13,627
Mark VII LSC Coupe	15,092	15,244	14,792
Continental Sedan	14,945	15,095	14,647
88 LINCOLN			
Town Car Sedan	11,866	11,984	11,625
Mark VII LSC Coupe	13,125	13,256	12,863
Continental Sedan	13,325	13,459	13,058
89 MAZDA 626			
LX Sedan 4 Dr	9,042	9,133	8,862
89 MERCURY COUGAR			
LS Coupe	9,349	9,442	9,163
88 MERCURY COUGAR			
LS Coupe	7,697	7,775	7,544
89 MERCURY TOPAZ			
GS Sedan 4 Dr	5,826	5,884	5,709
88 MERCURY TOPAZ			
GS Sedan 4 Dr	4,730	4,777	4,635
89 MERCURY SABLE			
GS Sedan 4 Dr	7,546	7,621	7,394
88 MERCURY SABLE			
GS Sedan	6,094	6,155	5,972
89 MERCURY GRAND MARQUIS			
GS Sedan	10,377	10,480	10,169
88 MERCURY GRAND MARQUIS			
GS Sedan	8,642	8,727	8,469
89 MITSUBISHI MIRAGE			
Sedan 4 Dr	5,262	5,315	5,157
88 MITSUBISHI MIRAGE			
Sedan	3,806	3,843	3,730
89 NISSAN SENTRA			
Sedan 2 Dr	4,627	4,673	4,535
89 NISSAN STANZA			
E Ntch 4 Dr	7,840	7,918	7,683
89 NISSAN MAXIMA			
SE Sedan	13,030	13,160	12,770
88 NISSAN SENTRA			
Sedan 2 Dr	3,788	3,826	3,712
88 NISSAN STANZA			
E Ntch 4 Dr	6,320	6,383	6,194
88 NISSAN MAXIMA			
SE Sedan	9,974	10,073	9,774
89 OLDS CIERA			
Coupe	7,040	7,111	6,899
Sedan	7,119	7,190	6,977
88 OLDS CIERA			
Coupe	5,676	5,732	5,562
Sedan	5,736	5,794	5,622
89 OLDS CALAIS			
Sedan	6,259	6,322	6,135
88 OLDS CALAIS			
Sedan	5,742	5,800	5,628
89 OLDS CUTLASS SUPREME			
Coupe	7,696	7,774	7,542
88 OLDS CUTLASS SUPREME			
Coupe	6,709	6,776	6,576
89 OLDS 98 REGENCY			
Sedan	11,327	11,440	11,099
88 OLDS 98 REGENCY			
Sedan	9,062	9,153	8,881
89 PLYMOUTH RELIANT			
Sedan	5,195	5,247	5,091
88 PLYMOUTH RELIANT			
Sedan	4,126	4,167	4,044
89 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	5,535	5,590	5,423
88 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	4,483	4,527	4,394
89 PLYMOUTH GRAN FURY			
Salon Sedan	5,376	5,430	5,269
88 PLYMOUTH GRAN FURY			
Salon Sedan	4,342	4,385	4,255
89 PLYMOUTH ACCLAIM			
Sedan	6,382	6,446	6,255
89 PONTIAC SUNBIRD			
LE Sedan	5,800	5,858	5,684
SE Coupe	5,956	6,017	5,838
88 PONTIAC SUNBIRD			
SE Coupe	4,842	4,891	4,745
SE Sedan	4,909	4,957	4,809
89 PONTIAC 6000			
LE Sedan	6,752	6,819	6,617
88 PONTIAC 6000			
Coupe	5,280	5,333	5,174
Sedan	5,340	5,394	5,233
89 PONTIAC GRAND AM			
LE Sedan	6,816	6,884	6,680
88 PONTIAC GRAND AM			
Sedan	5,717	5,775	5,603
89 PONTIAC BONNEVILLE			
LE Sedan	8,957	9,046	8,779
88 PONTIAC BONNEVILLE			
LE Sedan	7,548	7,622	7,397
89 PONTIAC GRAND PRIX			
Coupe	7,780	7,860	7,625
88 PONTIAC GRAND PRIX			
Coupe	6,853	6,921	6,716
89 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	6,808	6,877	6,672
89 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	8,870	8,957	8,691
89 TOYOTA CRESSIDA			
Lux Sedan	14,038	14,178	13,757
88 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	5,711	5,768	5,596
88 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	7,596	7,671	7,441
88 TOYOTA CRESSIDA			
Lux Sedan	11,638	11,755	11,405
89 VOLKSWAGEN JETTA			
Sedan 4 Dr	7,428	7,503	7,280
88 VOLKSWAGEN JETTA			
Sedan 4 Dr	6,105	6,167	5,983
89 VOLVO			
240 DL Sedan	12,088	12,210	11,847
88 VOLVO			
240 DL Sedan	10,364	10,469	10,158

NEW PRODUCTS

can do to help make sure their vehicle will start on even the coldest winter morning. *The Shaler Co.*

Circle 226 on Inquiry Card



TRANSPORT VEHICLES ECONOMICALLY with the KarTote KT-175I and KT-200I car tow dolly models built for heavy-duty commercial and industrial use. The dollys eliminate the need for an extra driver during transport and save the expense of a one-ton truck. The KT-175I model can tow car sizes ranging from subcompact to mid-size, while the KT-200I accommodates vehicles up to full-size models, including pickups. In addition, front-wheel-drive vehicles can be transported with either dolly model. Both models have an all-steel, unitized, reinforced frame designed for the strength and durability needed for commercial and industrial applications. A galvanized finish resists corrosion and requires little maintenance. Fenders are made from polyethylene plastic that resists wear and tear. In addition, both models feature a torsion axle with a built-in suspension system that reduces bouncing when an empty unit is being towed. *Automatic Equipment Manufacturing Co.*

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TROUBLESHOOT COMPUTER CONTROLLED SYSTEMS with the Tech 1, an interactive, bidirectional hand-held tester. Designed for use on GM, Chrysler, Ford, Isuzu, and Suzuki vehicles, the Tech 1 specializes in the diagnoses of GM systems providing testing developed in conjunction with General Motors Service Engineering for the diagnostics of all the latest computer control systems such as: the 4T60E electronic transmission, the Delco-Moraine anti-lock brake systems DM III and DM VI, and the Functional Test Directors for the automated testing of engine systems. In addition, the Tech I supports all standard "scanner" features. Additionally, the Tech 1 allows the user to control outputs such as EGR valves and torque converter clutches for many systems, helping the technician to quickly pinpoint the cause of the problem. A one-year warranty accompanies the Tech 1. *Vetronix.*

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7 Pass V6 Grand Caravan SE
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GAS PRICES

**UNLEADED GAS
Cost Per Gallon**

City	Full-Serve	Self-Serve
Fort Smith, AR	145.6¢	109.2¢
San Jose, CA	177.4	133.2
New Haven, CT	161.2	138.4
Jacksonville, FL	169.2	124.5
Gainesville, FL	130.9	114.4
Waterloo, IA	167.9	127.9
Boise, ID	140.7	123.9
Indianapolis, IN	139.9	112.9
New Orleans, LA	164.7	126.7
Baltimore, MD	169.5	134.7
Kansas City, MO	138.2	102.1
Charlotte, NC	147.4	123.9
Las Vegas, NV	178.4	157.8
Philadelphia, PA	153.6	133.1
Milwaukee, WI	145.5	113.6

The average U.S. full-serve gasoline price for the month of January was 149.5 cents per gallon.
The average U.S. self-serve gasoline price for the month of January was 128.3 cents per gallon.
Survey conducted during the first five working days of January 1991.
Supplied by Runzheimer International, Runzheimer Park, Rochester, WI.

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91 Professional Fleet
anager Award Nominees

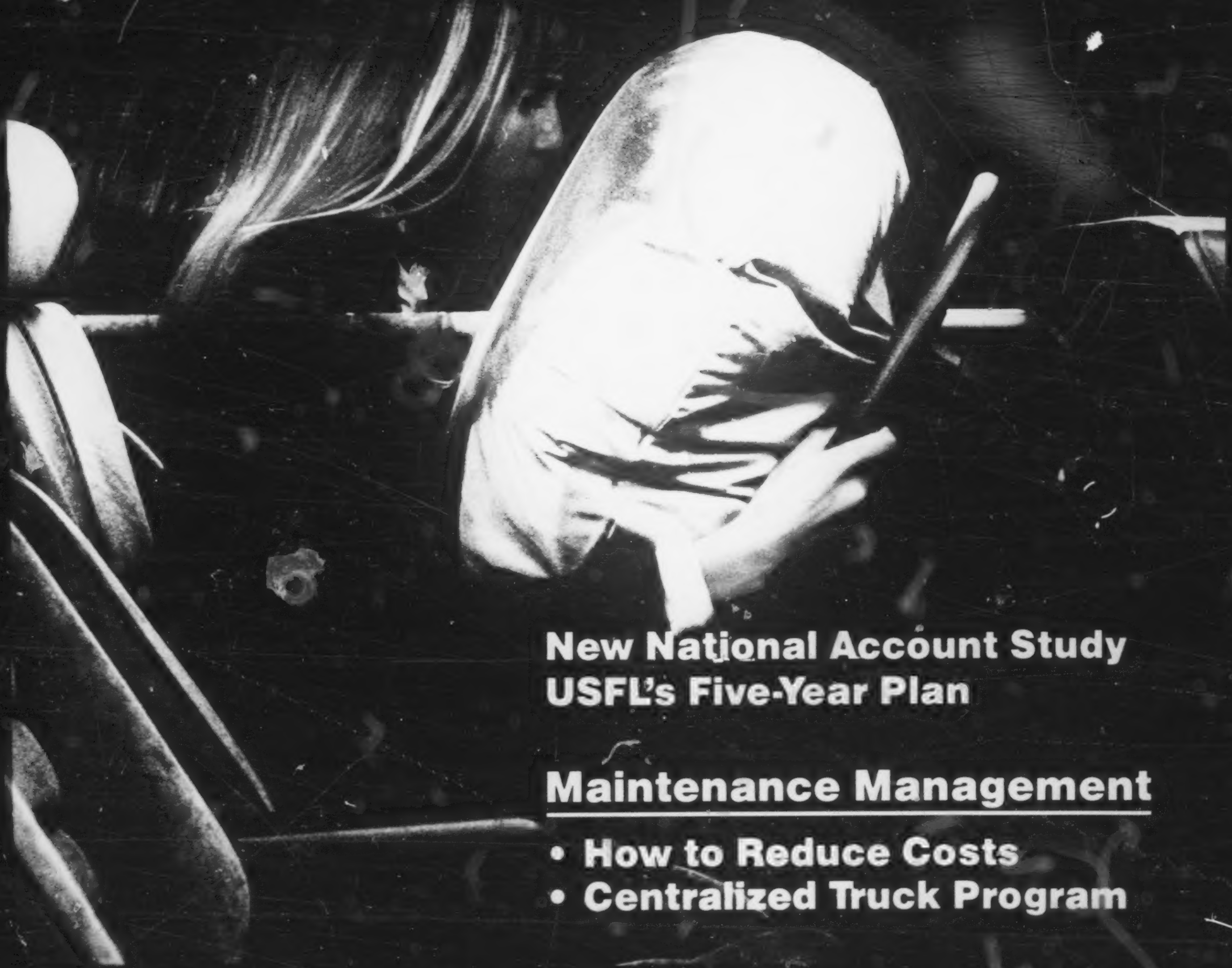
a bobit publication

March 1991

automotive FLEET

CAR AND LIGHT TRUCK FLEET AND LEASING MANAGEMENT MAGAZINE

Fleets Pop for Air Bags



New National Account Study

USFL's Five-Year Plan

Maintenance Management

- How to Reduce Costs
- Centralized Truck Program

automotive FLEET®

BOBIT PUBLISHING

CAR AND LIGHT TRUCK FLEET AND LEASING MANAGEMENT MAGAZINE

March 1991
VOL. 30, NO. 5

Influencing the management of 4,952,000 cars and 2,070,000 light trucks and vans in business, leasing, rental, utility, government, police, and taxi fleets.

Features

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p. 51

19 **Take a Broad View to Reduce Maintenance Expense**
Maintenance expenses are often narrowly interpreted as only applying to vehicles. However, to effectively control these costs, existing corporate policies and practices also should be reviewed.

22 **Air Bags Provide Safety Cushion for Fleet Drivers**
Insurance industry car fleets were the first to adopt air-bag-equipped vehicles, but this passive restraint system is gaining popularity within other industries, as well.

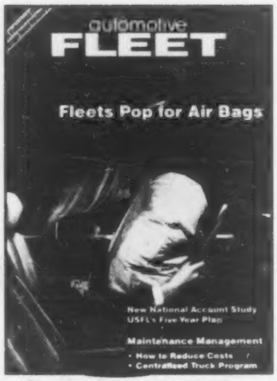
25 **Strong Candidates Entered for 1991 Fleet Manager Award**
Eighteen distinguished nominees are vying for the honor of the seventh annual Professional Fleet Manager Award, to be presented at Automotive Fleet's *Awards Brunch in Atlanta, GA.*

37 **United States Fleet Leasing: Its Five-Year Growth Plan**
The directive from USFL's parent company was "Grow your assets by becoming the top service provider in the industry." To accomplish this, the lessor plans, among other things, to penetrate the large fleet market and expand into Europe.

47 **National Accounts Survey Shows Big Fleet Volume**
The overwhelming majority of fleet managers responding to Automotive Fleet's *survey on national account usage say that their companies each spend in excess of a quarter of a million dollars per year on national account programs.*

Truck/Van Section

51 **Centralized Control Improves Maintenance Efficiencies**
Bell of Pennsylvania's Fleet Operations Control Center allowed the company to streamline the management of its service/repair facilities and reduce the number of foremen needed to run these operations.



On the Cover: Air bags are increasingly being mandated by fleets as standard equipment for their company vehicles. For more information on this trend and its history, see page 22.

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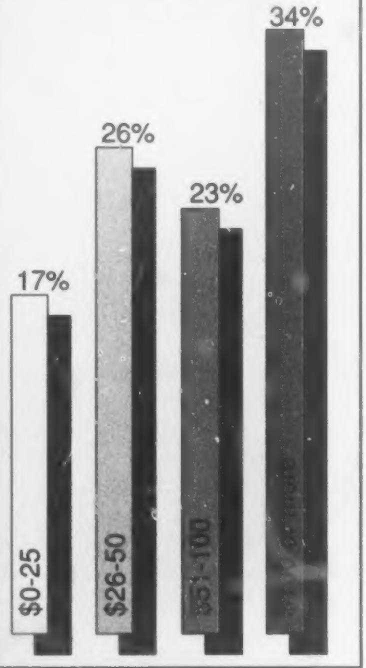
National Accounts Survey Shows Big Fleet Volume

Automotive Fleet's *first-ever survey of vendor usage shows most fleets are spending more than $250,000 per year on national account programs, and more than 90 percent say that number will either increase or stay the same in 1991.*

For the purpose of this survey, a national account is defined as "an agreement reached between a fleet and a supplier that: 1) makes available a variety of aftermarket products or services on a national or regional basis through multiple outlets; 2) provides a product or service utilizing a pre-negotiated pricing structure and uniform quality, and; 3) has the capability of centralized billing and/or the ability for a third party (e.g., a lessor or fleet management company) to authorize payment." Automotive Fleet *surveyed 500 fleet managers with fleets of 500 or more vehicles, and more than 322,000 vehicles are represented within this study, with trucks and vans comprising nearly half of that number (152,140).*

■ What Dollar Levels Can Drivers Authorize?



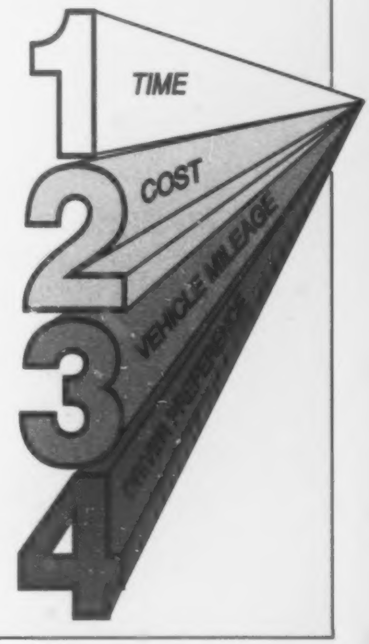
Saving vehicle downtime is fleet managers' most important criterion when deciding whether or not to use a national account program offered by a major supplier of fleet products or services, according to respondents of the 1991 *Automotive Fleet* National Accounts Survey.

Cost, however, is an important criterion, and was cited by fleet managers as the second most important factor influencing their decisions in selecting how and where vehicles will be serviced, fueled, and repaired, and whether or not they use a national account program.

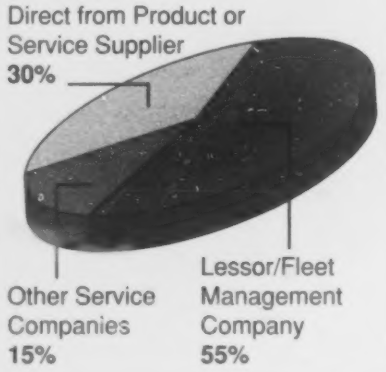
Vehicle mileage and driver preference followed time and cost as the other most important considerations.

Surprisingly, the one expense category in which fleets spend the most money, fuel (a $6.3 billion annual expenditure, according to *Automotive Fleet's* 1990 Operating and Maintenance Cost Study), is the one category in which fleet managers say they use

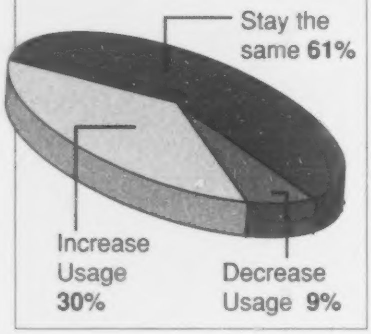
■ Criteria Influencing Expenditures Most



■ National Account Suppliers: Where Do Fleets Go?



■ National Account Expenditure Forecast



national account vendors the least, with 67 percent saying they do not use an oil company fleet credit card with centralized national account billing and control. Other categories in which national accounts are not used frequently include body damage repair and paint work (a $882 million annual fleet expenditure), and rental cars for loaners when regular company vehicles are out of service or when awaiting delivery of new vehicles.

The most popular category for national account usage is tires, for which 88 percent say that they use a major tire manufacturer outlet for replacement tires and tire repair. The next most popular categories for national account usage are oil changes/lubes and shocks/brake service, which net 72 percent respectively, followed by battery replacement (67 percent), glass replacement and engine service/repairs (65 percent each), and transmission work (62 percent).

When deciding which national account to use in a given situation, drivers are often given a wide berth, with 78 percent of fleet managers saying that their drivers can choose among the company's national account programs for the specific vendor they wish to use, while only 22 percent say that drivers must use the account designated by the company. Drivers are also given considerable latitude in authorizing product or service charge amounts. According to the survey, 34 percent of fleet managers allow their drivers to authorize $100 or more for repairs or products at a national account location, while 26 percent are allowed to authorize between $25-50 worth of goods or services. The third largest category, $50-100 authorization, netted 23 percent, and the smallest category, the $0-25 expense range, received 17 percent.

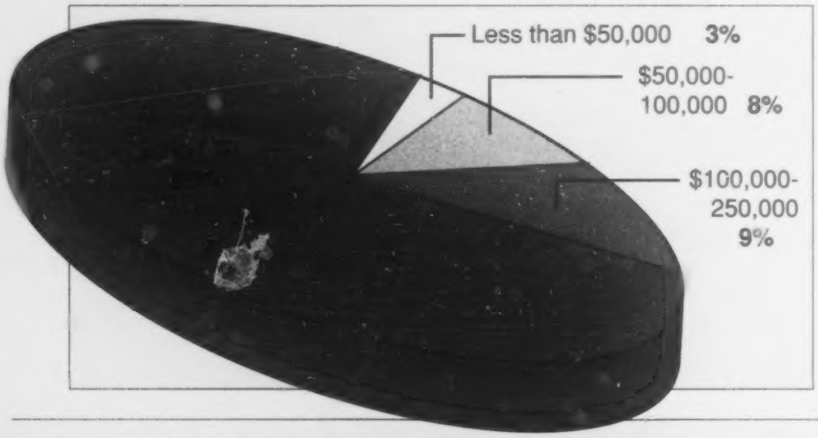
The majority of survey respondents say that their national account program is provided by or through a lessor or fleet management company (55 percent), while 30 percent say that they buy direct from the product or service supplier. The final category, "other service companies," received a 15 percent response from fleet managers who answered this question.

What does a year of national account usage by a fleet add up to? For 80 percent of the fleet managers responding, the figure is greater than $250,000 per year, according to survey results. Only three percent spend less than $50,000, and eight percent and nine percent spend between $50,000-100,000 and $100,000-250,000, respectively. Fleets traditionally pay for their account via company purchase orders (38 percent), with 28 percent saying that they use a national account fleet card. Preventive maintenance coupon books are used for 21 percent of purchases, and driver reimbursement and vouchers or drafts net a combined 13 percent.

For most companies, the future of national account usage looks stable, with 61 percent saying that their usage will remain the same in the coming year as it was during the last. Thirty percent foresee a rise in their usage, while only nine percent see their national account usage decreasing. AF

(For a complete look at the results of this survey, turn to page 50.)

■ Annual National Accounts Expenditures



National Accounts Survey Summary

Response rate to survey	26%
Number of cars in survey:	170,383
Number of trucks and vans in survey:	152,140
Total number of vehicles:	322,523

Do you use a national account for the following:		
Fuel	33% yes	67% no
Oil Change/ Lube	72% yes	28% no
Tires	88% yes	12% no
Glass replacement	65% yes	35% no
Shocks/Brake Service	72% yes	28% no
Engine Service/Repairs	65% yes	35% no
Car Rental (Loaners)	57% yes	43% no
Body Damage Repair	40% yes	60% no
Paint	38% yes	62% no
Transmission Work	62% yes	38% no
Battery Replacement	67% yes	33% no

How is payment made for national account services or products?	
Fleet Card	28%
Company Purchase Order	38%
PM Coupon Book	21%
Driver Reimbursement	9%
Vouchers/Drafts	4%

Do you use a national account provided by:	
Lessor/Fleet Management Company	55%
Direct from Product or Service Supplier	30%
Other Service Companies	15%

Do you foresee your usage of national accounts to:	
Increase	30%
Decrease	9%
Stay the same	61%

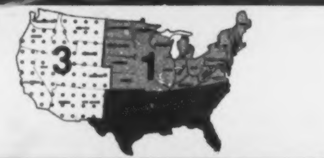
What criteria influences the majority of your national accounts expenditures?	
First Criteria:	Time
Second Criteria:	Cost
Third Criteria:	Vehicle mileage
Fourth Criteria:	Driver preference

What dollar levels can drivers authorize?	
$0-25	17%
$26-50	26%
$51-100	23%
$100 or more	34%

How much driver discretion do you allow?	
Driver must use certain account	22%
Driver may select from designated national account	78%

USED-CAR PRICES

The following are average used-car prices for the period ending February 1, 1991. Prices are based on wholesale activity at major dealers across the country. They are divided into three zones as indicated on the accompanying map. These averages are calculated electronically. They are based on clean cars only. Proper allowance should be made for upgrading sharp cars and proper deduction taken for fair cars. Automatic transmissions have been included in the averages of all models. This information is published in *Automotive Fleet* by special permission of *Automotive Market Report*.



89 BUICK SKYHAWK			
Coupe	5,750	5,806	5,632
Sedan	5,828	5,888	5,712
88 BUICK SKYHAWK			
Coupe	4,725	4,800	4,656
Sedan	4,817	4,865	4,721
89 BUICK SKYLARK			
Cust Sedan	6,692	6,759	6,550
88 BUICK SKYLARK			
Cust Sedan	5,626	5,681	5,512
89 BUICK CENTURY			
Cust Sedan	6,996	7,068	6,858
88 BUICK CENTURY			
Cust Sedan	5,638	5,689	5,526
89 BUICK LESABRE			
Cust Sedan	9,014	9,104	8,834
88 BUICK LESABRE			
Cust Sedan	7,460	7,535	7,311
89 CADILLAC DEVILLE			
Coupe	15,208	15,360	14,905
Sedan	15,374	15,530	15,067
88 CADILLAC DEVILLE			
Coupe	11,975	12,093	11,735
Sedan	12,115	12,235	11,872
89 CADILLAC SEVILLE			
Sedan	15,372	15,527	15,064
88 CADILLAC SEVILLE			
Sedan	12,725	12,853	12,470
89 CHEVY BERETTA			
Coupe	6,631	6,699	6,499
88 CHEVY BERETTA			
Coupe	5,559	5,619	5,448
89 CHEVY CORSICA			
Hatchback 4 dr.	6,319	6,383	6,193
88 CHEVY CORSICA			
Sedan	5,143	5,194	5,040
89 CHEVY CAVALIER			
Sedan	5,397	5,452	5,289
88 CHEVY CAVALIER			
Sedan	4,477	4,523	4,387
89 CHEVY CELEBRITY			
Sedan	6,426	6,490	6,297
88 CHEVY CELEBRITY			
Sedan	5,076	5,127	4,976
89 CHEVY CAPRICE			
Sedan	7,230	7,302	7,084
88 CHEVY CAPRICE			
Sedan	5,863	5,923	5,748
89 CHRYSLER LEBARON			
Highline Sedan	6,542	6,607	6,409
88 CHRYSLER LEBARON			
Sedan	5,110	5,162	5,009
89 CHRYSLER NEW YORKER			
Sedan	10,312	10,415	10,107
88 CHRYSLER NEW YORKER			
Sedan	8,661	8,748	8,487
89 CHRYSLER FIFTH AVENUE			
Sedan	10,485	10,587	10,273
88 CHRYSLER FIFTH AVENUE			
Sedan	8,400	8,486	8,233
89 DODGE ARIES AMERICA			
Sedan	5,089	5,140	4,987
88 DODGE ARIES AMERICA			
Sedan	4,032	4,064	3,941
89 DODGE SHADOW			
Liftbk 5 Dr	5,424	5,478	5,315
88 DODGE SHADOW			
Liftbk 5 Dr	4,375	4,418	4,287
89 DODGE DYNASTY			
Sedan	7,748	7,826	7,592
89 FORD ESCORT			
Htchbk 4 Dr LX	4,706	4,753	4,612
88 FORD ESCORT			
Htchbk 4 Dr GL	3,646	3,683	3,573
89 FORD MUSTANG			
LX-4 Coupe	6,278	6,339	6,151
88 FORD MUSTANG			
LX-4 Coupe	5,167	5,219	5,063
89 FORD TEMPO			
GL Sedan 4 Dr	5,560	5,616	5,449
88 FORD TEMPO			
GL Sedan 4 Dr	4,518	4,563	4,427
89 FORD TAURUS			
GL Sedan 4 Dr	7,337	7,411	7,189
88 FORD TAURUS			
GL Sedan 4 Dr	5,862	5,923	5,746
89 FORD CROWN VICTORIA			
Sedan	9,641	9,737	9,448
88 FORD CROWN VICTORIA			
Sedan	7,830	7,908	7,671
89 THUNDERBIRD			
Coupe	8,688	8,774	8,513
88 THUNDERBIRD			
Coupe	7,086	7,157	6,944
89 LINCOLN			
Town Car Sedan	13,557	13,694	13,286
Mark VII LSC Coupe	14,715	14,863	14,422
Continental Sedan	14,571	14,718	14,281
88 LINCOLN			
Town Car Sedan	11,629	11,744	11,392
Mark VII LSC Coupe	12,862	12,991	12,606
Continental Sedan	13,058	13,190	12,797
89 MAZDA 626			
LX Sedan 4 Dr	8,640	8,727	8,467
89 MERCURY COUGAR			
LS Coupe	9,162	9,253	8,980
88 MERCURY COUGAR			
LS Coupe	7,558	7,635	7,408
89 MERCURY TOPAZ			
GS Sedan 4 Dr	5,709	5,766	5,595
88 MERCURY TOPAZ			
GS Sedan 4 Dr	4,612	4,658	4,519
89 MERCURY SABLE			
GS Sedan 4 Dr	7,395	7,469	7,246
88 MERCURY SABLE			
GS Sedan	5,972	6,032	5,853
89 MERCURY GRAND MARQUIS			
GS Sedan	10,169	10,270	9,966
88 MERCURY GRAND MARQUIS			
GS Sedan	8,469	8,552	8,300
89 MITSUBISHI MIRAGE			
Sedan 4 Dr	5,028	5,079	4,928
88 MITSUBISHI MIRAGE			
Sedan	3,655	3,691	3,582
89 NISSAN SENTRA			
Sedan 2 Dr	4,330	4,372	4,243
89 NISSAN STANZA			
E Ntch 4 Dr	7,377	7,450	7,229
89 NISSAN MAXIMA			
SE Sedan	12,680	12,807	12,427
88 NISSAN SENTRA			
Sedan 2 Dr	3,545	3,580	3,473
88 NISSAN STANZA			
E Ntch 4 Dr	5,976	6,036	5,857
88 NISSAN MAXIMA			
SE Sedan	9,385	9,478	9,197
89 OLDS CIERA			
Coupe	6,920	6,990	6,782
Sedan	6,998	7,062	6,858
88 OLDS CIERA			
Coupe	5,580	5,635	5,467
Sedan	5,638	5,696	5,526
89 OLDS CALAIS			
Sedan	6,134	6,196	6,012
88 OLDS CALAIS			
Sedan	5,598	5,655	5,487
89 OLDS CUTLASS SUPREME			
Coupe	7,581	7,657	7,429
88 OLDS CUTLASS SUPREME			
Coupe	6,608	6,674	6,477
89 OLDS 98 REGENCY			
Sedan	11,100	11,211	10,877
88 OLDS 98 REGENCY			
Sedan	8,881	8,970	8,703
89 PLYMOUTH RELIANT			
Sedan	5,065	5,116	4,964
88 PLYMOUTH RELIANT			
Sedan	4,032	4,063	3,943
89 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	5,424	5,478	5,315
88 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	4,371	4,414	4,284
89 PLYMOUTH GRAN FURY			
Salon Sedan	5,268	5,321	5,164
88 PLYMOUTH GRAN FURY			
Salon Sedan	4,233	4,275	4,149
89 ACCLAIM			
Sedan	6,254	6,317	6,130
89 PONTIAC SUNBIRD			
LE Sedan	5,684	5,741	5,570
SE Coupe	5,837	5,897	5,721
88 PONTIAC SUNBIRD			
SE Coupe	4,721	4,769	4,626
SE Sedan	4,786	4,833	4,689
89 PONTIAC 6000			
LE Sedan	6,617	6,683	6,485
88 PONTIAC 6000			
Coupe	5,174	5,226	5,071
Sedan	5,233	5,286	5,128
89 PONTIAC GRAND AM			
LE Sedan	6,646	6,712	6,513
88 PONTIAC GRAND AM			
Sedan	5,574	5,631	5,463
89 PONTIAC BONNEVILLE			
LE Sedan	8,778	8,865	8,603
88 PONTIAC BONNEVILLE			
LE Sedan	7,397	7,470	7,249
89 PONTIAC GRAND PRIX			
Coupe	7,624	7,703	7,472
88 PONTIAC GRAND PRIX			
Coupe	6,716	6,783	6,582
89 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	6,538	6,604	6,407
88 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	5,429	5,483	5,319
89 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	8,346	8,428	8,177
88 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	7,221	7,292	7,077
89 TOYOTA CRESSIDA			
Lux Sedan	13,454	13,588	13,185
88 TOYOTA CRESSIDA			
Lux Sedan	11,007	11,117	10,786
89 VOLKSWAGEN JETTA			
Sedan 4 Dr	7,244	7,316	7,099
88 VOLKSWAGEN JETTA			
Sedan 4 Dr	5,892	5,953	5,775
89 VOLVO			
240 DL Sedan	11,631	11,749	11,400
88 VOLVO			
240 DL Sedan	9,952	10,053	9,754

NEW PRODUCTS

ONE-PIECE SLAM LATCH INSTALLS WITHOUT TOOLS and can be used for compartment enclosures in cars and trucks. An integral elastomeric tongue located underneath the exterior housing acts as a spring for the latch. In the closed position, the spring relaxes but firmly holds the catch behind the frame edge or strike. To open a door or panel, insert a finger into the finger recess and push the latch away from the frame edge. The latch will not corrode and is resistant to fatigue. *Camloc Products.*

Circle 227 on Inquiry Card

"IN CONTROL WITH SAM POSEY" is a 65-minute VHS videotape designed to help drivers understand the key elements of safe driving, and to appreciate the important role that seat belts play not only in lessening injuries, but in avoiding accidents altogether. The video uses plain, non-technical language to give a thorough working knowledge of effective vehicle-control responses to emergency situations. The video is narrated by Emmy-winning ABC sports analyst and Indy 500 veteran Sam Posey, and meets OSHA specifications for driver training. *In Control.*

Circle 228 on Inquiry Card

ANTI-FREEZE RECOVERY SYSTEM provides anti-freeze at a purity level previously available only from large commercial systems. By applying heat to dirty engine coolant, the Bad Ethyl first evaporates and then condenses the pure water once contained in radiator waste solution. Then, utilizing the same technology used by chemical anti-freeze manufacturers, vacuum distillation safely and effectively recovers pure ethylene glycol. Once properly inhibited with a one-bottle addition of Finish Thompson Engine Coolant Treatment, the recovered ethylene glycol becomes anti-freeze that meets all original manufacturer specifications for corrosion inhibition and thermal protection. *Finish Thompson Inc.*

Circle 229 on Inquiry Card

PROTECT SPARE TIRES ON SIDEKICKS with Suzuki's new spare tire case. The tire case is made of durable sheet molding compound to minimize expansion and contraction. *American Suzuki.*

Circle 230 on Inquiry Card

CLASSIFIED

FLEET SALES MANAGER

Requires ten years wholesale automotive fleet sales and sales management experience and the ability to travel extensively. A Bachelor's Degree with a Marketing concentration is preferred.

Send your resume with salary history/requirements to: Human Resources Specialist, P.O. Box 915, Rockleigh, NJ 07647. We are an equal opportunity employer.

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24-Hour Phone Service
FAX us your consignments (718) 274-9558

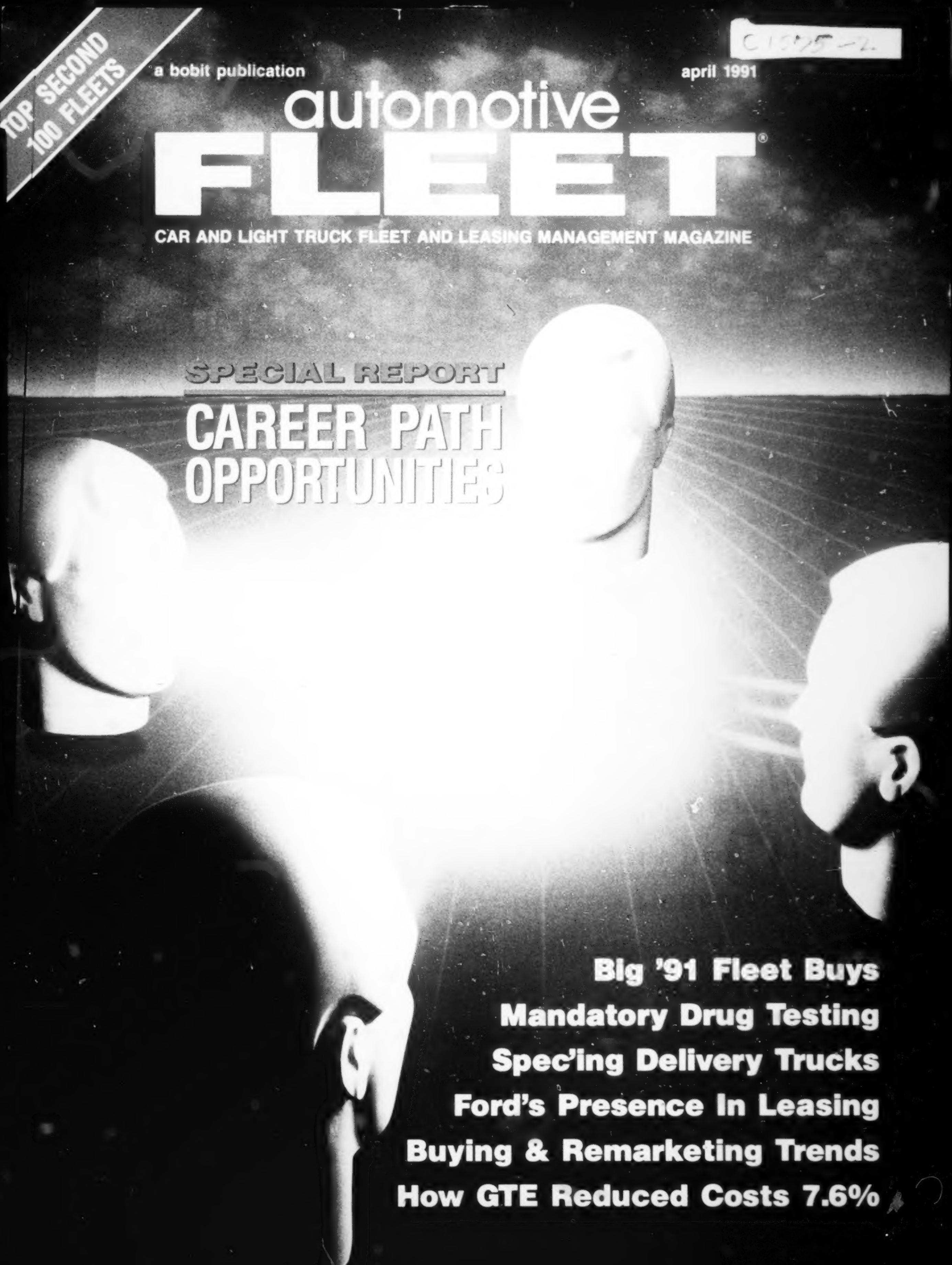
GAS PRICES

UNLEADED GAS
Cost Per Gallon

City	Full-Serve	Self-Serve
Juneau, AK	192.9¢	179.9¢
Mobile, AL	152.9	113.4
San Rafael, CA	166.9	118.9
Denver, CO	163.2	119.9
Washington, D.C.	156.5	123.3
Orlando, FL	145.2	122.1
Maui, HI	204.6	156.6
Chicago, IL	172.5	133.0
Lexington, KY	132.2	114.4
Boston, MA	135.5	121.5
St. Paul, MN	145.4	118.9
Albuquerque, NM	151.9	122.9
Buffalo, NY	149.2	128.2
Charleston, SC	134.0	113.9
Houston, TX	160.9	115.0

The average U.S. full-serve gasoline price for the month of February was 143.9 cents per gallon.
The average U.S. self-serve gasoline price for the month of February was 121.3 cents per gallon.
Survey conducted during the first five working days of February 1991.
Supplied by Runzheimer International, Runzheimer Park, Rochester, WI.

C1595-2



TOP SECOND 100 FLEETS

a bobit publication

april 1991

automotive FLEET®

CAR AND LIGHT TRUCK FLEET AND LEASING MANAGEMENT MAGAZINE

SPECIAL REPORT

CAREER PATH OPPORTUNITIES

Big '91 Fleet Buys

Mandatory Drug Testing

Spec'ing Delivery Trucks

Ford's Presence In Leasing

Buying & Remarketing Trends

How GTE Reduced Costs 7.6%

automotive
FLEET®

CAR AND LIGHT TRUCK FLEET AND LEASING MANAGEMENT MAGAZINE

April 1991
VOL. 30, NO. 6

Influencing the management of
5,090,000 cars and 2,209,000 light trucks
and vans in business, leasing, rental,
utility, government, police, and taxi fleets.

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42 **Centralizing Fleet Operations Cuts GTE's Costs 7.6%**
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46 **What Is Ford's Motivation for Owning Fleet Lessors?**
An interview with Ken Whipple, president of Ford Financial Services.

52 **Fleet Spring Ordering Remains Stable**
Some of the nation's largest fleets discuss their 1991-model year spring orders and the vehicles on their selectors.

60 **Police Agencies Express Concern About 1990 Caprice Restraint System**
Following the death of a Maine police officer, some police agencies have asked to retrofit active restraints into 1990 Caprices. Plus, GM presents an open letter on why it advises against retrofitting

64 **Motorola Fleet Makes Drug Testing Work**
Addressing safety concerns and meeting government contract requirements are only part of the motivation behind Motorola's employee drug-testing program.

72 **A Successful Career Requires Effective Communication with Management**
Business communication should be conducted clearly and concisely. The old engineer's adage, K.I.S.S. — Keep It Simple, Stupid — is a good place to start.

79 **Anglo American's Next Generation of Growth: Vertical Expansion**
The marketing strategies that took Anglo from a start-up nine years ago to handling nearly 1.25 million consignments will continue, but the emphasis now is on expanding client services.

84 **Field Narrows to Three for Fleet Manager Award**
Here are the top three nominees for AF's Professional Fleet Manager Award, which will be presented on April 28 in Atlanta, GA.

87 **Charging Drivers & Frequent Inspections Reduce Abuse**
Driver abuse has been cited by fleet managers as the primary cause of vehicle breakdown. Monitoring vehicle condition and charging for excessive damage may end this problem.

88 **Ford Expands FSP by Introducing New Programs**
A look at Ford's Fleet Service Plan, which offers fleets varying levels of repair coverage plus the added dividends of streamlined administration and improved vehicle residual values.

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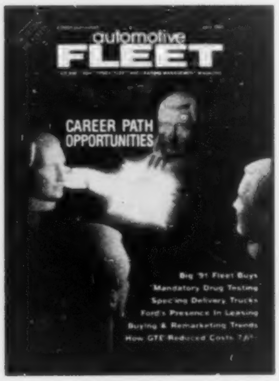

On the cover: What kinds of career path opportunities exist for fleet managers in a rapidly-changing economy? To get the first-hand story from several experienced fleet managers, see the Special Report, starting on page 28.

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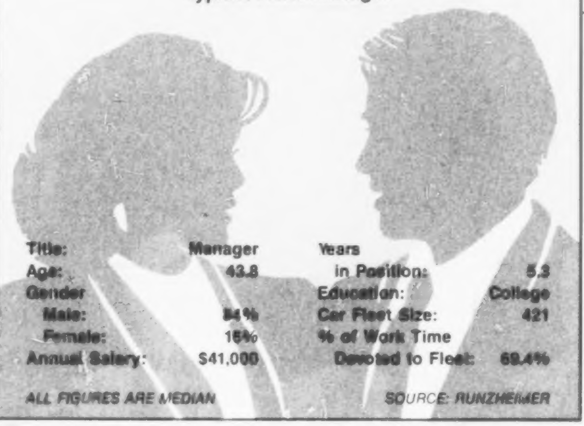
Redefining Fleet Management To "People Movement"

Fleet management must be redefined. A fleet manager's responsibilities should be expanded to encompass the entire spectrum of employee transportation and not restricted solely to the administration of company vehicles.

Typical Fleet Manager



Title: Manager
Age: 43.8
Gender
Male: 84%
Female: 16%
Annual Salary: $41,000
Years in Position: 5.3
Education: College
Car Fleet Size: 421
% of Work Time Devoted to Fleet: 69.4%

ALL FIGURES ARE MEDIAN

SOURCE: RUNZHEIMER

Fleet management has been variously described as either: a science, an unappreciated profession, a dead-end position, a stepping-stone to better things, or a job function better left to external management. In reality, it's all of these. That's the problem.

In reality, fleet management is a management function that exists solely to provide the most efficient transportation to achieve specific corporate goals. It should never be perceived as having a "life of its own."

In its ongoing attempts to justify its own existence, fleet management would do well to remember that its only purpose is to *serve management's interest*, and it's to *that* end that fleet managers should direct their efforts.

Changes have occurred in fleet management and some of them, unfortunately, have been negative. One result is that some corporate managements now question the need for fleet operations as they presently exist, and to look for simpler, less expensive alternatives.

Fleet management must stand up and face these changes squarely, and start to *manage* their departments, which according to Webster's dictionary, means, "To control the action...handle...guide...to have charge of, direct..."

Sales and service fleets are now, and will continue to be, a vital cog in the industrial engine which drives the nation's economy. As the importance of sales and service fleets increases, so too will the importance of the corporate fleet manager.

Fleet management today is a recognized profession, having evolved into quite a sophisticated responsibility as a result of computerization and other technology. But it is again at a crossroad.

Fleet management must be redefined. It's not enough to be concerned only with vehicles used in business, it must be expanded to encompass the entire field of "people movement."

The movement of goods is well-defined under the general heading of traffic management. The movement of people, on the other hand, is fragmented. Besides fleet management, the movement of people includes air travel, hotel reservations, car rentals, household goods movement, and employee relocation. Sometimes each of these areas administered within a corporation has its own staff, policies, and procedures, often reporting to different management areas. Yet they all involve the movement of people. Why not organize these various areas under a single, centralized management? The logical choice, of course, would be the fleet management area.

Not only will this provide a much-needed shot in the arm to fleet management, but it would be equally important to corporate management. Placing all "people-moving activity" under fleet management would provide cost savings, efficiency, effectiveness, and coordination, plus give corporate management the ability to control all policy through one management function.

All of these fields are tied together and the responsibility to administer this function could be best handled by a newly-established position called "director, personnel transportation," which today's fleet managers could aspire to. AF

Charging Drivers & Frequent Inspection Reduce Abuse

A company's preventive and regular maintenance programs are useless if drivers abuse their cars. According to one survey, excessive wear and tear by drivers is the leading cause of fleet vehicle breakdowns.

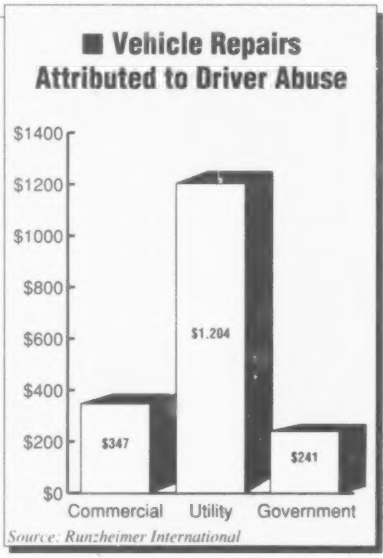
The best preventive maintenance program is almost useless if drivers abuse their company vehicles. Such abuse leads to expensive repairs that add substantially to the cost of operating a fleet.

According to a study by *Runzheimer Reports on Fleet Management*, 62 percent of the 117 fleet administrators surveyed cite driver abuse or neglect as the primary cause of vehicle breakdowns. The average cost of repairs per vehicle due to driver abuse range from $1,204 for utility fleets, $347 for business fleets, and $241 for government fleets. Driver neglect and abuse is one of the most difficult problems faced by fleet managers on a daily basis.

Drivers can abuse vehicles in several ways. They can ignore scheduled preventive maintenance servicing, delay reports of vehicle problems, alter or modify equipment, and ignore vehicle appearance.

Vehicle abuse not only increases the cost of repairs, it also depreciates the vehicle's resale value. Abused vehicles also are dangerous to drive. Brakes may be ineffective, engine power reduced, steering imprecise, and tires worn.

To deal with vehicle abuse, it is essential to motivate drivers to take better care of their vehicles. Fleet managers might even consider charging drivers for excess wear and unreported physical damage.


Vehicle Repairs Attributed to Driver Abuse

Source: Runzheimer International

Charging for excess wear and tear saves the company money and encourages drivers to stick to maintenance schedules and to report minor accidents. There also may be an additional savings in insurance costs due to the improved safety performances of more conscientious drivers operating better-maintained and damage-free vehicles.

To charge drivers for excess wear, first establish the average resale value of the vehicle in "clean" condition, and then establish the actual net resale value after reconditioning charges have been determined by a knowledgeable third party. Calculate the difference between the two amounts and charge the difference back to the driver. This procedure, however, would not be practical for fleets with pool vehicles shared by a number of drivers; no single driver could be considered responsible for the vehicle, and charging for excess wear would be difficult.

Another way to get drivers to take better care of their vehicles is to establish periodic inspections. Drivers who perform pre-trip and/or post-trip inspections often cut down on such problems as poor steering and alignment, burned out headlights, worn brakes and tires, and low lubricant, coolant, and tire pressure levels. Whatever the method of improving the upkeep of vehicles, it is important to have a written policy regarding company expectations.

Still another method is to offer them the option of purchasing their vehicles when they are taken out of fleet service. For the driver, fleet vehicles can be a good buy — but only if the vehicles have been well-maintained. This method works best when drivers are given a broad selector list of makes, models, options, and accessories. Drivers would not want to buy from a limited list of cars with little optional equipment.

New Vehicle Buys Steady Despite War & Recession

The 1991 NAFA New Vehicle Acquisition Survey says the majority of commercial fleets see stability in their fleets' size, and 17 percent even plan fleet growth. Initial cost and loyalty are key factors influencing their buying decisions.

Fleet managers responding to the National Association of Fleet Administrators 1991 New Vehicle Acquisition Survey say that 51 percent of their fleets will have no change in size during the coming year, while 17 percent plan an increase in the number of vehicles in their fleets.

In 1990, 20 percent of respondents said that their fleet size would grow, and six percent said that their fleets would decrease. In 1991, 15 percent say there will be a decrease in the number of vehicles in their fleets during the coming year, registering the largest percentage change among these categories.

What Fleets Will Purchase

For commercial fleets, a total of 207 respondents said that they plan to purchase 51,970 vehicles in the1991-model year, with 76 percent of those being automobiles, 14 percent vans, and 10 percent light-duty trucks. Fleet managers indicated that their most important considerations when ordering new vehicles were, in order of importance:

1. Initial cost.
2. Job suitability.
3. Economy of operation.
4. Repair record.
5. Serviceability.
6. Safety record.
7. Depreciation/resale value.
8. Warranty program.
9. Order/delivery time.
10. Country of origin.
11. Company image/prestige.
12. Driver preference.

■Expected Average Initial Cost of a Single 1991-Model Year Vehicle

	Cars	Vans	Light-Duty Trucks
Banking/Finance	$11,194	$13,863	$16,250
Chemical &Petroleum	13,945	15,170	13,824
Consumer Marketing	13,150	14,045	13,033
Communications	10,680	14,575	15,333
Drugs & Cosmetics	13,381	14,621	15,311
Electronics	12,825	11,410	13,000
Food & Beverage	12,656	14,708	11,598
Industrial Manufacturing	13,606	14,985	15,538
Insurance	12,140	15,611	14,571
Service Organization	13,162	14,180	17,237
▲All Commercial Fleets	**$12,674**	**$14,316**	**$14,569**
▲Govt./Law Enforcement	**$11,845**	**$13,981**	**$13,983**
▲Public Utility	**$11,462**	**$13,366**	**$13,135**

Loyalty Prevails

Fleets also indicated that they plan to remain loyal to the vehicles they have ordered in the past, with 87 percent of commercial fleet respondents saying they do not plan to change the nameplate, size, or type of vehicle that they have ordered in the past.

However, when it comes to the equipment on those vehicles, it is another story. Fleets said that in about half of their cases (52 percent), manufacturer option package offerings had affected their selection of fleet vehicles.

A common complaint among 71 percent of the responding commercial fleets was that even though they reordered the same vehicles, option

FLEET ORDERS

Number of 1991-Model Year Vehicles Expected to Puchase or Lease	Cars	Vans	Light-Duty Trucks	Total
Banking/Finance	593	61	27	681
Chemical & Petroleum	2,355	660	3,139	6,154
Consumer Marketing	2,019	945	236	3,200
Communications	362	247	76	65
Drugs & Cosmetics	9,311	1,215	180	10,706
Electronics	508	340	12	860
Food & Beverage	5,819	661	207	6,687
Industrial Manufacturing	4,693	1,547	714	6,854
Insurance	13,868	274	59	14,201
Service Organization	299	1,051	592	1,942
▲ **Total Commercial Fleet**	**39,727**	**7,001**	**5,242**	**51,970**
▲ **Government/Law Enforcement**	**7,061**	**660**	**1,465**	**9,189**
▲ **Public Utility**	**422**	**812**	**733**	**1,967**

packaging forced them to purchase more equipment than on past purchases. Seventeen percent said that they selected different models or manufacturers than they normally do, in order to obtain optional equipment packages that they wanted and five percent said that they selected the same vehicles that they otherwise would have, but were forced to take less equipment than they would have liked.

Commercial fleets also say their average cost of a new automobile has dropped slightly, from 1990's average cost of $12,854 to a 1991 average cost of $12,674. For vans, the average cost increased slightly from $14,272 to $14,316, but the price jump was not as large as last year's $926 jump from 1989 costs. For light-duty trucks, the average cost rose from $14,194 to $14,569; this compares to a $848 rise in price

Does Your Company Purchase or Lease Import Vehicles?	%Yes	%No	If No, Why Not?* Company-written "domestic only" policy %	Company-perceived "domestic only" policy %	Personal preference of fleet management %	Driver preference %
Banking/Finance	0	100	45	22	22	0
Chemical & Petroleum	8	92	4	76	4	8
Consumer Marketing	7	93	9	67	25	8
Communications	0	100	17	33	17	0
Drugs & Cosmetics	30	70	16	42	0	0
Electronics	0	100	0	80	0	0
Food & Beverage	3	97	11	75	7	0
Industrial Manufacturing	11	89	39	52	6	0
Insurance	5	95	14	69	3	0
Service Organization	10	90	0	44	45	0
▲ **All Commercial Fleets**	**8**	**92**	**16**	**56**	**13**	**2**
▲**Government/Law Enforcement**	**4**	**96**	**20**	**38**	**5**	**0**
▲**Public Utility**	**0**	**100**	**15**	**55**	**15**	**0**

**Percentages do not equal 100 due to incomplete questionnaires*

FLEET ORDERS

from 1989 to 1990.

According to overall results, Ford/Lincoln-Mercury will gain the biggest share of fleet acquisitions among respondents, garnering 39 percent of the orders this spring, and edging out last year's fleet favorite, General Motors which will receive 35 percent of new vehicle orders. Chrysler will receive 22.3 percent of 1991-model fleet orders.

Import Penetration Increases

Import buying will increase among survey respondents for 1991, with 2.7 percent reporting that they plan to buy import vehicles, compared to one percent in 1990. Eight percent of the responding commercial fleets said that they currently purchase or lease import vehicles, but the overwhelming majority, 92 percent, said they do not.

When asked if they would *consider* buying or leasing an import vehicle, 42 percent of the commercial fleets said that they would not, with 14 percent saying they would. Thirty-four percent were unsure if they would consider an import. When asked why they felt this way about buying or leasing import vehicles, respondents said their attitudes reflected "a company-perceived domestic-only buying policy" (56 percent), "a company-written domestic-only policy" (16 percent), and "personal preference of fleet management" (13 percent). AF

■ **If Manufacturer Option Packages Have Affected Vehicle Selection, Which Condition Applies?**	Select same vehicles with more equipment %	Select same vehicles with less equipment %	Select different models or manufacturers because they offer desired optional equipment %	Other %
Banking/Finance	61	13	13	13
Chemical & Petroleum	61	13	13	13
Consumer Marketing	82	0	9	9
Communications	100	0	0	0
Drugs & Cosmetics	64	9	27	0
Electronics	100	0	0	0
Food & Beverage	70	0	15	15
Industrial Manufacturing	71	8	8	13
Insurance	82	6	6	6
Service Organization	20	0	80	0
▲All Commercial Fleets	**71**	**5**	**17**	**7**
▲Government/Law Enforcement	**95**	**0**	**5**	**0**
▲Public Utility	**75**	**25**	**0**	**0**

■ **Ordering Changes Planned During Next Year***	Lease vehicles previously purchased %	Puchase vehicles previously leased %	Divest most of fleet to employee ownership %	Reduce number of vehicles in fleet %	Increse number of vehicles in fleet %	Other %	No substantial changes considered %
Banking/Finance	0	25	0	25	0	0	50
Chemical & Petroleum	0	4	0	13	13	21	58
Consumer Marketing	0	0	0	21	21	29	43
Communications	0	33	0	0	17	17	50
Drugs & Cosmetics	4	8	0	4	23	27	54
Electronics	0	0	0	20	20	20	60
Food & Beverage	0	14	0	17	14	17	48
Industrial Manufacturing	0	12	0	12	24	24	47
Insurance	0	12	0	24	17	19	43
Service Organization	0	11	0	11	22	0	56
▲Total Commercial Fleet	**4**	**12**	**0**	**14**	**17**	**17**	**51**
▲Government/Law Enforcement	**0**	**6**	**0**	**17**	**6**	**6**	**70**
▲Public Utility	**0**	**23**	**0**	**8**	**0**	**0**	**69**

**Percentages do not Equal 100 due to Multiple Responses*

Retabulating NAFA's Remarketing Survey

This article will break out the remarketing practices of commercial, public utility, and government/law enforcement fleets based on NAFA's recent remarketing survey so that results are specific to each of these three fleet categories.

The only reliable guide to the future is knowledge of the past. This is particularly true as it applies to the resale of company vehicles, which determines the ultimate success or failure of a fleet's vehicle program.

Fleet managers are required to select makes, models, and equipment, and must decide when to buy, and when and how to sell. Often, the only sources of information and guidance available to them is their own experience, discussion with their peers, and information provided in industry surveys such as this.

First and foremost, it is important to understand the purpose of surveys. Surveys identify trends and give a comparison base, but each company's unique fleet needs and requirements are the key factors in establishing remarketing goals and performance.

Automotive Fleet considers used-vehicle remarketing so important that it decided to prepare this follow-up article to the NAFA Used-Vehicle Remarketing Survey, published in the February 1991 issue of *Automotive Fleet*. This follow-up article retabulates these survey results by specific fleet categories, rather than drawing conclusions based on responses from all survey participants. In order to correctly interpret these retabulated results, however, some background information may be helpful:

■ **Chart 1.**

Number of Responding Fleets

Industry Classification	
Banking/Finance	2%
Chemicals & Petroleum	7%
Communications	2%
Consumer Manufacturing	5%
Drugs & Cosmetics	8%
Electronics	1%
Food & Beverage	8%
Insurance	12%
Industrial Manufacturing	6%
Service Organization	1%
Other	12%
▲Total Commercial	**64%**
▲Total Govt./Law Enf.	**22%**
▲Total Public Utility	**14%**
■ Grand Total	**100%**

As reflected in the revised survey, there are three fleet categories that are highlighted. They are: commercial, government/law enforcement and public utility fleets. These fleet categories are defined, for the purposes of this article, as follows:

- **Commercial Fleets:** These are fleets operated by private enterprise companies that offer products or services for profit.
- **Public Utility Fleets:** These are quasi-government-type organizations that are subject to controls and restrictions which make them unlike any other type of fleet.
- **Government/Law Enforcement Fleets:** These groups are also subject to great scrutiny and control, which impacts their operation and management methods. In fact, law enforcement fleets could even be considered as a separate group because of their obviously unique fleet vehicle usage.

As it applies to these three types of fleets, purchasing fleet vehicles is invariably governed by four basic factors:

- Vehicle Usage.
- Vehicle Cost.
- Serviceability/Reliability.
- Resale Value/Depreciation.

It's also true that various industry groups within the commercial fleet segment have unique interests and usage where fleet operations are concerned. Knowing these basic facts makes it easier to understand why the survey responses from these fleets have been presented separately for this article.

Remarketing Survey Highlights

As Chart 1 indicates, government/law enforcement fleets represent 22 percent of the total responses to the NAFA survey. Public utilities represent 14 percent, and commercial fleets account for 64 percent.

Company-owned or Leased?

Although the overall breakdown of all survey respondents in Chart 3 (page 104) shows 59 percent of their fleets as leased and 41 percent as company-owned, the combined weight of government, law enforcement, and public utility fleets (a combined 36 percent of total responding fleets) skews the figures for commercial fleets. By retabulating survey responses by fleet category, it shows that 57 percent of the responding commercial fleets are leased and 43 percent are owned.

A major consideration in the proper evaluation of resale data is the impact of company ownership versus leasing. While the company-owned fleets are responsible for their own sales, leased units are resold by the lessor, with the possible exception of some units sold to employees.

How were Vehicles Sold?

Sales of 1989-model year vehicles show that auctions predominate as the method of sale for the three groups. Commercial fleets, however, tend use wholesalers and employee sales more often than either government/law enforcement or public utility fleets. Commercial fleets and government fleets are remarkably similar in the type of vehicles they sell (both registered 74 percent automobiles), but public utility fleets skew the totals, because they sell approximately 24 percent light-duty trucks, as opposed to 12 and 14 percent light-duty trucks for commercial and government/law enforcement fleets, respectively.

■ **Chart 2.**

Average Months in Service	
Commercial Fleets	32
Govt./ Law Enf. Fleets	66
Public Utility Fleets	58

How Long are Vehicles Kept?

As Chart 2 indicates, government/law enforcement and public utility fleets have a disproportional effect on the average months-in-service for fleet vehicles, especially on automobiles. By retabulating the survey responses, the average service life is 32 months for commercial fleets, 58 months for public utility fleets and 66 months for government/law enforcement fleets. Mileage figures for each fleet category were unavailable.

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REMARKETING UPDATE

■ Chart 3.

Percent Company-Owned / Leased Vehicles

	Company Owned			Leased			Total		# Veh.
	Auto	Vans	Light Trucks	Auto	Vans	Light Trucks	Co.Owned	Leased	
Banking/Finance	37%	36%	35%	63%	63%	65%	37%	63%	672
Chemical & Petroleum	98%	74%	84%	4%	28%	16%	88%	12%	12,832
Communication	100%	0%	100%	0%	100%	0%	100%	0%	465
Consumer/Mfg	70%	48%	53%	30%	52%	47%	65%	35%	3,520
Drugs and Cosmetics	2%	9%	51%	98%	91%	49%	3%	97%	10,570
Electronics	1%	1%	0%	99%	99%	100%	1%	99%	1,785
Food and Beverage	25%	64%	74%	75%	36%	26%	48%	52%	9,391
Insurance	28%	95%	71%	72%	5%	29%	30%	70%	8,793
Industrial Manufacturing	4%	17%	51%	96%	83%	49%	17%	83%	6,136
Service Organization	38%	32%	100%	64%	68%	0%	41%	59%	2,487
Other	33%	59%	66%	67%	41%	34%	45%	55%	7,098
■ **Total Commercial**	**30%**	**41%**	**76%**	**70%**	**45%**	**24%**	**43%**	**57%**	**61,729**
■ **Total Govt./Law Enforcement**	**81%**	**70%**	**87%**	**19%**	**30%**	**13%**	**81%**	**19%**	**33,284**
■ **Public Utility**	**72%**	**67%**	**76%**	**28%**	**33%**	**24%**	**73%**	**27%**	**20,036**
■ **Non-commercial Total**	**51%**	**55%**	**79%**	**49%**	**45%**	**23%**	**59%**	**41%**	**115,051**

How Much is Spent on Recon?

Chart 4 was converted to percentages, as opposed to NAFA's original presentation by the number of respondents, to better emphasize the application of reconditioning expenses by fleet category. Commercial fleets are somewhat more likely to recondition vehicles before resale than are either government/law enforcement or public utility fleets. The average expenditure for commercial fleets falls between $0 and $300.

Chart 5 shows how many of each type of vehicle was sold through each method in 1989 (see page 106).

Respondents Determine Quality

The most frustrating aspect of surveys, as anyone who has ever tried to conduct one can appreciate, are the incomplete, illegible, and often unbelievable answers received from respondents. The next time you receive a survey questionnaire, please take the time to provide the requested information, in legible handwriting, and return it promptly so that accurate information on the fleet industry can be made available. AF

■ Chart 4.

Average Reconditioning Expense Per Vehicle

	$0	Less than $100	$101-$300	$301-$500	$501-$700	More than $700
Banking/Finance	100%	0%	0%	0%	0%	0%
Chemicals & Petroleum	56%	33%	0%	0%	11%	0%
Communications	0%	100%	0%	0%	0%	0%
Consumer/Manufacturing	40%	20%	40%	0%	0%	0%
Drugs & Cosmetics	0%	25%	62%	0%	0%	13%
Electronics	50%	0%	0%	50%	0%	0%
Food & Beverage	50%	10%	10%	20%	0%	10%
Insurance	31%	31%	32%	0%	6%	0%
Industrial Manufacturing	38%	37%	0%	25%	0%	0%
Service Organization	100%	0%	0%	0%	0%	0%
Other	54%	33%	13%	0%	0%	0%
▲ **Total Commercial**	**43%**	**27%**	**20%**	**5%**	**2%**	**2%**
▲ **Total Govt./Law Enf.**	**38%**	**35%**	**19%**	**8%**	**0%**	**0%**
▲ **Total Public Utility**	**36%**	**32%**	**32%**	**0%**	**0%**	**0%**
▲ **Non-commercial Total**	**39%**	**30%**	**21%**	**6%**	**2%**	**2%**

■ **Chart 5.**

How Many of Each Type of Vehicle was Sold Through Each Method in 1989?

	Autos*					Vans*					Light-Duty Trucks*				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Banking/Finance	49%	45%	5%	0%	1%	0%	100%	0%	0%	0%	0%	0%	0%	0%	0%
Chemicals & Petroleum	20%	22%	8%	0%	50%	19%	23%	20%	19%	19%	26%	7%	25%	11%	30%
Communications	91%	0%	3%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%	0%	0%
Consumer Mfg.	36%	46%	17%	0%	1%	46%	42%	9%	3%	0%	20%	80%	0%	0%	0%
Drugs & Cosmetics	21%	53%	26%	0%	0%	21%	21%	18%	20%	19%	21%	22%	19%	19%	19%
Electronics	37%	83%	0%	0%	0%	30%	70%	0%	0%	0%	0%	0%	0%	0%	0%
Food & Beverage	28%	43%	28%	1%	0%	10%	0%	30%	0%	0%	8%	3%	89%	0%	0%
Insurance	27%	29%	29%	12%	3%	14%	0%	14%	0%	72%	33%	67%	0%	0%	0%
Industrial Manufacturing	36%	21%	42%	0%	19%	28%	18%	54%	0%	0%	54%	9%	33%	0%	4%
Service Organization	0%	39%	61%	0%	0%	33%	37%	30%	0%	0%	0%	100%	0%	0%	0%
Other	37%	53%	5%	3%	2%	17%	81%	0%	0%	2%	17%	66%	0%	59%	12%
▲ **Total Commercial**	**29%**	**43%**	**24%**	**2%**	**2%**	**23%**	**30%**	**26%**	**10%**	**11%**	**25%**	**27%**	**22%**	**10%**	**16%**
▲ **Total Govt./Law Enf.**	**8%**	**74%**	**15%**	**2%**	**1%**	**15%**	**71%**	**14%**	**0%**	**0%**	**8%**	**85%**	**7%**	**0%**	**0%**
▲ **Total Public Utility**	**39%**	**60%**	**1%**	**0%**	**0%**	**38%**	**51%**	**4%**	**1%**	**6%**	**42%**	**46%**	**2%**	**0%**	**8%**
■ **Non-commercial Total**	**24%**	**54%**	**19%**	**2%**	**1%**	**23%**	**42%**	**28%**	**7%**	**6%**	**26%**	**48%**	**11%**	**4%**	**9%**

*** 1 = Employees, 2 = Auctions, 3 = Wholesalers, 4 = New-Car Dealers, 5 = Used-Car Dealers**

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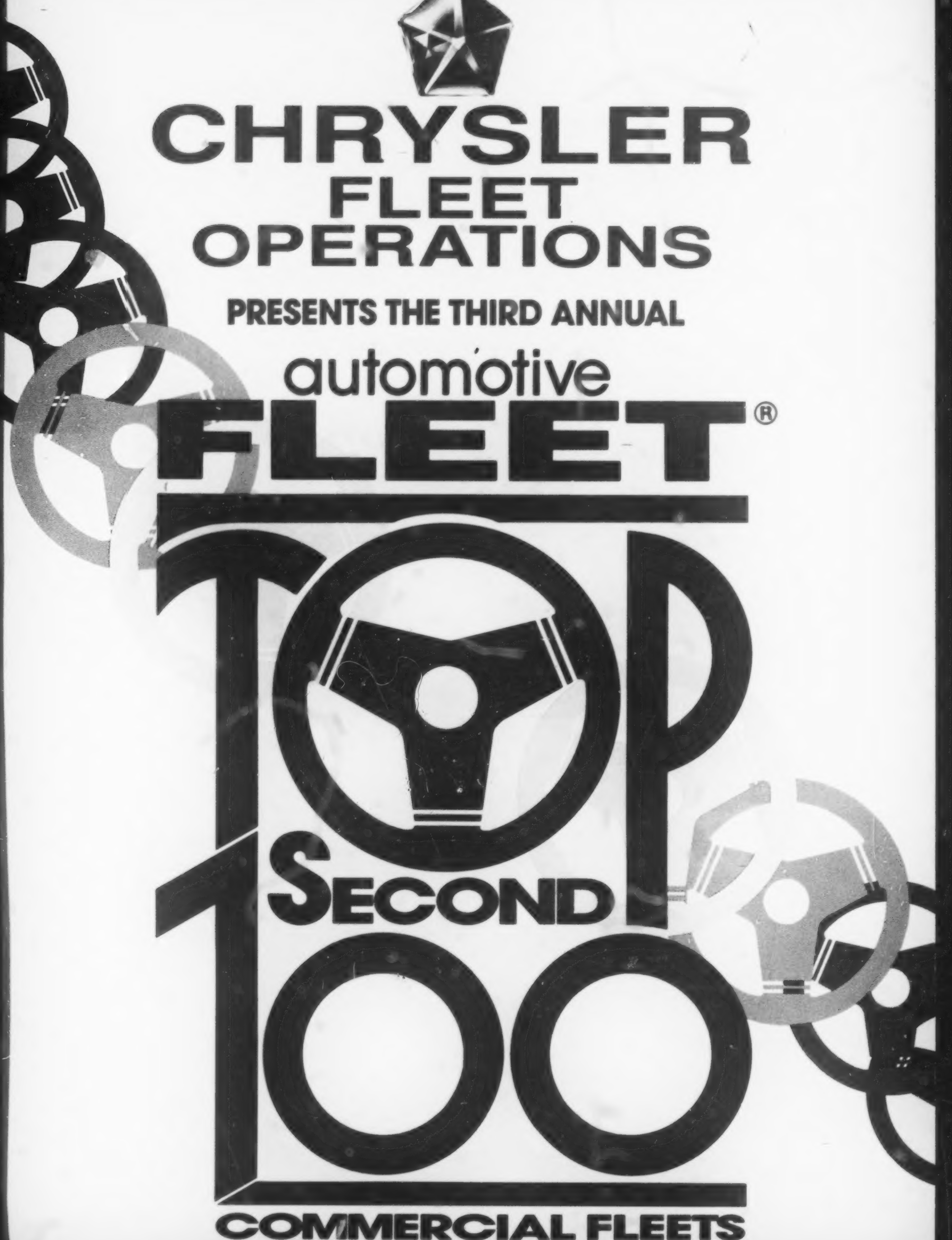

TOP SECOND 100

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FLEET RANKINGS

Top Second 100 Commercial Fleets

In order to qualify for the Top 100 and the Top Second 100 listings in *Automotive Fleet* magazine, a fleet must be a part of a business/corporate commercial fleet entity that has centralized automotive control. Companies operating driver reimbursement programs for employee-owned vehicles are not included.

Fleet size is verified by the *Automotive Fleet* research department by telephone and/or mail inquiry. Counted as a part of a fleet's total vehicles are company-controlled automobiles, vans, and trucks under 19,500 lbs. GVW. Not counted are lift trucks, trailers, or trucks larger than Class V.

Approximately 300 of the larger commercial fleet operations are selected from *AF*'s circulation list to be recipients of the Top 100 and Top Second 100 survey study for ranking. The 1991 Top 100 listing appeared in *AF*'s February 1991 issue.

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Weyerhaeuser Co	174
Wickes Companies	139

FLEET RANKINGS

'91 RANK	'90 RANK	Company Name & Headquarters	Fleet Contact	Co. Owned	Lessors	# Cars	# Trucks Vans	Total
101	117	James River Corp. Richmond, VA	Rita Stokes	—	ARI, PHH, Associates	1,900	0	1,900
102	40	USX Corp. Pittsburgh, PA	Don Hillwig	—	PHH	380	1,520	1,900
103	159	Miles Laboratories, Inc. Elkhart, IN	Debbie Bailey	—	GEC Fleet, Wheels	1,136	758	1,894
104	125	Electronic Data Systems Richardson, TX	Rich Piper	X	—	975	918	1,893
105	103	Rockwell Int. Corp. Pittsburgh, PA	Ken Campos	—	Southgate	1,750	125	1,875
106	—	JR Simplot Co. Mining/Mineral Pocatello, ID	Terry McLaughlin	X	—	125	1,740	1,865
107	—	Centel Corp. Chicago, IL	Bill Kintigh	X	—	112	1,750	1,862
108	97	Continental Insurance Cranbury, NJ	Jean Marie Albrecht Victor Kaplij		PHH	1,830	20	1,850
109	—	Ogden Allied Services Corp. New York, NY	Joe Smith	X	—	600	1,250	1,850
110	142	Allstate Insurance Co. Northbrook, IL	Donald Gorr	X	—	1,702	113	1,815
111	—	Aratex Services Encino, CA	Merritt Kinne	X	—	500	1,300	1,800
112	127	Automatic Data Processing Roseland, NJ	Mike Sankowitch	—	GEC Fleet	1,550	250	1,800
113	116	FMC Corp. Chicago, IL	Lawrence Dakof	X	GEC Fleet	700	1,100	1,800

FLEET RANKINGS

'91 RANK	'90 RANK	Company Name & Headquarters	Fleet Contact	Co. Owned	Lessors	# Cars	# Trucks Vans	Total
114	128	Stroehmann Bakeries Horsham, PA	Dale Stevens	X	PHH	185	1,600	1,785
115	133	General Mills Minneapolis, MN	Henry Paetzel	X	—	1,478	287	1,765
116	139	Roche Biomed Labs Burlington, NC	Jane Crabbe	—	Wheels	1,659	98	1,757
117	—	Environmental Industries, Inc. Calabasas, CA	Bill Johnson	X	—	200	1,550	1,750
118	105	Montgomery Ward Chicago, IL	Roseann Neveitt	—	GEC Fleet, PHH	190	1,560	1,750
119	141	Schering–Plough Kenilworth, NJ	Robert Keckeissen	—	PHH	1,700	35	1,735
120	132	E.R. Squibb & Sons, Inc. Princeton, NJ	Jeff Zielinski	—	PHH	1,693	41	1,734
121	134	Eaton Corp. Cleveland, OH	Robert J. Wagner	—	LMV, GEC Fleet	1,312	408	1,720
122	—	Texaco Inc., Central Houston, TX	Bernie Bryl	—	PHH	285	1,430	1,715
123	129	Liberty Mutual Insurance Boston, MA	Barbara Feinberg	X	—	1,661	46	1,707
124	161	CIBA–GEIGY Pharm. Summit, NJ	Barbara Bell	—	PHH	1,535	165	1,700
125	137	Johnson & Johnson New Brunswick, NJ	Joyce Donini	—	PHH	1,500	200	1,700
126	138	Philips Medical Systems Shelton, CT	Rose Ruchin	—	PHH	1,500	200	1,700

FLEET RANKINGS

'91 RANK	'90 RANK	Company Name & Headquarters	Fleet Contact	Co. Owned	Lessors	# Cars	# Trucks Vans	Total
127	131	Sandoz Pharm. East Hanover, NJ	Barbara Eutsler	—	Wheels, Emkay	1,663	28	1,691
128	140	Simplex Time Recorder Gardner, MA	Jerry Albertini	—	Wheels	911	779	1,690
129	143	Lorillard Tobacco Co. New York, NY	Sal Giacchi	—	GEC Fleet, PHH, Wheels	380	1,305	1,685
130	—	W.R. Grace & Co. New York, NY	J. W. Enterline	—	PHH, USFL	395	1,290	1,685
131	135	GAB Business Services Inc. Parsippany, NJ	G.J. Keenan	—	GEC Fleet, PHH	1,648	8	1,656
132	180	Nestle Foods Corp. Purchase, NY	Jack Stellabotte	X	—	1,150	500	1,650
133	148	Hallmark Cards Kansas City, MO	Debbie Mize	X	—	1,560	70	1,630
134	130	Bank of America Concord, CA	Tom Martin	X	—	1,120	505	1,625
135	136	NCR Tech. Dayton, OH	Anne Mangen	—	GEC Fleet, Wheels	425	1,200	1,625
136	197	S.C. Johnson & Son Racine, WI	Karen Fries Mike Tranchida	X	—	600	1,017	1,617
137	149	Household Finance Corp. Prospect Heights, IL	Kris Ernstmeyer	X	ARI	1,555	60	1,615
138	145	Bridgestone/Firestone Chicago, IL	Mel Martin	X	—	600	1,000	1,600
139	147	Wickes Companies Santa Monica, CA	Ron Aimhein	—	Associates	1,098	486	1,584

FLEET RANKINGS

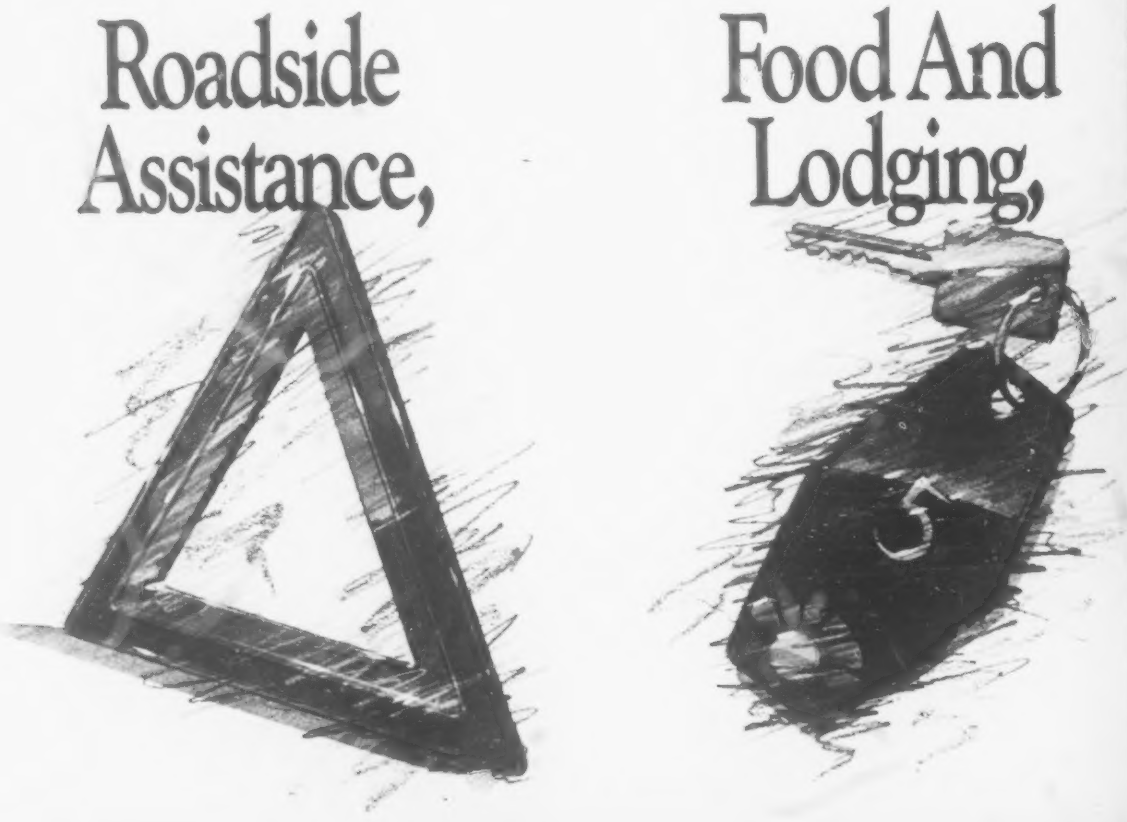
'91 RANK	'90 RANK	Company Name & Headquarters	Fleet Contact	Co. Owned	Lessors	# Cars	# Trucks Vans	Total
140	155	Legg's Products, Inc. Winston–Salem, NC	Andy T. Collins	—	PHH	200	1,380	1,580
141	—	PMI Food Equipment Troy, OH	Mark Welty	X	—	508	1,061	1,569
142	—	Amerigas Sacramento, CA	Jim Stevens	X	—	100	1,451	1,551
143	—	Borg–Warner Chicago, IL	Phyllis Howard	—	In-house	200	1,345	1,545
144	—	Texaco Trading & Transportation Denver, CO	Donna Olinovich	—	PHH	760	770	1,530
145	124	Brown & Root USA Houston, TX	Roger D. Ivey	X	—	175	1,350	1,525
146	—	Centerior Energy Independence, OH	Jack Sedio Tom Allen	X	—	212	1,296	1,508
147	153	Alexander & Alexander Baltimore, MD	Barbara Medley	X	—	1,500	0	1,500
148	154	Moore Business Forms Glenview, IL	Chuck Blaise	—	ARI	1,500	0	1,500
149	—	Cal Gas Corp. Sacramento, CA	Jimmy Todal	X	—	30	1,451	1,481
150	157	Wausau Insurance Wausau, WI	Robert Rakow	X	GEC Fleet, USFL	1,460	20	1,480
151	163	American Int'l Realty Corp. Manchester, NH	Edward L. Rogers	X	—	1,463	6	1,469
152	169	Syntex Laboratories, Inc. Palo Alto, CA	R.A. Schlossareck	—	ARI, Wheels	1,307	162	1,469

FLEET RANKINGS

'91 RANK	'90 RANK	Company Name & Headquarters	Fleet Contact	Co. Owned	Lessors	# Cars	# Trucks Vans	Total
153	158	American Greetings Cleveland, OH	Gene Lusnek	—	LMV, PHH	1,400	50	1,450
154	164	Campbell Sales Co. Camden, NJ	Charles Schnerr	—	Wheels	1,330	90	1,420
155	162	Alco Standard Corp. Valley Forge, PA	Jo Ann Tripp	—	Wheels, Avis	1,036	375	1,411
156	190	CNA Insurance Chicago, IL	Michael Wagner	X	Wheels, GEC Fleet	1,381	0	1,381
157	166	Kemper Group Long Grove, IL	Frank Pastorino	X	—	1,365	12	1,377
158	—	J.I. Case Co. Racine, WI	Bill McNellis	X	—	325	1,050	1,375
159	—	Amtrak Philadelphia, PA	Ed Stuhl	X	—	100	1,257	1,357
160	181	American Cyanamid Wayne, NJ	Robert DeFeo	—	ARI, PHH, Wheels	1,300	0	1,300
161	—	The Los Angeles Times Los Angeles, CA	Cletus Page	X	—	650	650	1,300
162	170	Union Oil of California Los Angeles, CA	Ken Cgata	X	—	1,300	0	1,300
163	111	USG Corp. Chicago, IL	Mary Sabathne	—	ARI, Donlen	1,000	300	1,300
164	171	Picker International Co. Highland Heights, OH	Betty Strader	X	—	1,249	50	1,299
165	86	General Foods USA White Plains, NY	Joy Bloech	X	PHH	1,200	75	1,275

FLEET RANKINGS

'91 RANK	'90 RANK	Company Name & Headquarters	Fleet Contact	Co. Owned	Lessors	# Cars	# Trucks Vans	Total
166	186	Nalco Chemical Corp. Naperville, IL	Yvonne Bonahoom	—	PHH	950	300	1,250
167	150	Fireman's Fund Ins. Novato, CA	Sylvia Jones	X	PHH	1,228	13	1,241
168	174	The Quaker Oats Co. Barrington, IL	Linda Tegmeyer	—	Associates	1,170	50	1,220
169	185	Land O'Lakes, Inc. Minneapolis, MN	Bruce Charon	—	Farmcredit, GEC Fleet	850	357	1,207
170	—	Apple Computer Cupertino, CA	Lillian Ferrell	—	GEC Fleet PHH	1,200	0	1,200
171	115	Control Data Corp. Minneapolis, MN	Kathleen Webster	—	McCullagh, GEC Fleet	300	900	1,200



'91 RANK	'90 RANK	Company Name & Headquarters	Fleet Contact	Co. Owned	Lessors	# Cars	# Trucks Vans	Total
172	114	Flowers Industries Thomasville, GA	Mark Worthey	X	—	0	1,200	1,200
173	175	Intracorp Berwyn, PA	Pat Kays	—	PHH	1,200	0	1,200
174	176	Weyerhaeuser Co. Tacoma, WA	Donna McKivor	—	Nickerson	800	400	1,200
175	160	Bell & Howell Skokie, IL	Mike Winfield	—	Wheels	1,150	40	1,190
176	189	American Family Mutual Ins. Madison, WI	Gray Perrett	X	—	1,123	52	1,175
177	—	United Cable Television Denver, CO	Richard Belkie	X	—	75	1,100	1,175

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FLEET RANKINGS

'91 RANK	'90 RANK	Company Name & Headquarters	Fleet Contact	Co. Owned	Lessors	# Cars	# Trucks Vans	Total
178	—	Reliance Electric Co. Cleveland, OH	Phil Tedeschi	—	PHH, GEC Fleet	409	741	1150
179	173	K–Mart Corp. Troy, MI	Alice Schurrer	X	—	992	147	1,139
180	—	Ferrellgas Liberty, MO	Val Dois	X	—	81	1,021	1,102
181	184	Ohio Casualty Ins. Co. Hamilton, OH	G. Michael Ulreich	X	—	1,095	5	1,100
182	193	Oxy USA Inc. Tulsa, OK	Bill Jeffers	—	Wheels	180	912	1,092
183	192	St. Paul Fire & Marine Insurance St. Paul, MN	Paul King	—	GEC Fleet, ARI	1,058	6	1,064
184	83	Pillsbury Co. Minneapolis, MN	John Christensen	—	GEC Fleet	785	275	1,060
185	195	Beckman Instruments Fullerton, CA	Patty Whitchurch	X	PHH, Wheels GEC Fleet	270	780	1,050
186	—	Gencorp/General Tire Akron, OH	Bob Klausman	X	—	350	650	1,000
187	181	Thomas J. Lipton, Inc. Englewood Cliffs, NJ	Bill Benzie	—	GEC Fleet	990	10	1,000
188	172	Tektronix, Inc. Beaverton, OR	Johnnie Schmauder	X	—	800	174	974
189	—	First American Financial Corp. Santa Ana, CA	John Buehler	—	PHH	968	0	968
190	200	Pinkerton Security & Investigation Van Nuys, CA	Andrew Eichner	—	USFL	617	309	926

FLEET RANKINGS

'91 RANK	'90 RANK	Company Name & Headquarters	Fleet Contact	Co. Owned	Lessors	# Cars	# Trucks Vans	Total
191	194	Perkin Elmer Norwalk, CT	Richard Fisher	—	GEC Fleet, PHH	800	100	900
192	183	Siemens Nixdorf/Telplus Boca Raton, FL	Robert Morris	—	ARI, Mike Albert Leasing	300	600	900
193	—	Air Products & Chemicals, Inc. Allentown, PA	Doug Buffington	X	GEC Fleet, Wheels	550	300	850
194	—	ARKLA Inc. Shreveport, LA	Joe Lions	X	—	50	800	850
195	—	Petrolane/Suburban Propane Whippany, NJ	Wally Euart	X	—	200	625	825
196	177	McDermott, Inc. Barbertown, OH	Marty Sellars	X	—	480	320	800
197	—	TRW Info. Sys. Orange, CA	Janis Christensen	—	Wheels, GEC Fleet	720	80	800
198	198	Parker–Hannifin Corp. Cleveland, OH	Bridget O'Neill	—	GEC Fleet, McCullagh	600	100	700
199	199	TRW/CSD Fairfield, NJ	Carol Mitchell Harry Francisco	—	USFL	216	435	651
200	—	Flagship Cleaning Services, Inc. Philadelphia, PA	Roland Brauch	X	ARI, Chrysler Finance, Hansen	200	434	634

TOTAL CARS: 87,071

TOTAL TRUCKS & VANS: 54,149

TOTAL VEHICLES: 141,220

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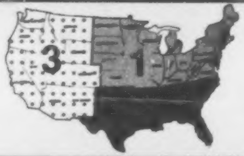
USED-CAR PRICES

The following are average used-car prices for the period ending March 1 1991. Prices are based on wholesale activity at major dealers across the country. They are divided into three zones as indicated on the accompanying map. These averages are calculated electronically. They are based on clean cars only. Proper allowance should be made for upgrading sharp cars and proper deduction taken for fair cars. Automatic transmissions have been included in the averages of all models. This information is published in *Automotive Fleet* by special permission of *Automotive Market Report.*



89 BUICK SKYHAWK			
Coupe	5,512	5,565	5,391
Sedan	5,587	5,644	5,475
88 BUICK SKYHAWK			
Coupe	4,518	4,564	4,428
Sedan	4,580	4,626	4,490
90BUICK SKYLARK			
Cust Sedan	7,602	7,677	7,451
89 BUICK SKYLARK			
Cust Sedan	6,395	6,460	6,268
90 BUICK CENTURY			
Cust Sedan	8,270	8,353	8,103
89 BUICK CENTURY			
Cust Sedan	6,606	6,672	6,474
90 BUICK LESABRE			
Cust Sedan	10,961	11,071	10,743
89 BUICK LESABRE			
Cust Sedan	8,589	8,675	8,416
90 CADILLAC DEVILLE			
Coupe	16,810	16,979	16,476
Sedan	16,982	17,152	16,642
89 CADILLAC DEVILLE			
Coupe	14,416	14,559	14,128
Sedan	14,573	14,721	14,282
90 CADILLAC SEVILLE			
Sedan	17,747	17,923	17,390
89 CADILLAC SEVILLE			
Sedan	14,646	14,793	14,353
90 CHEVY BERETTA			
Coupe	7,504	7,578	7,352
89 CHEVY BERETTA			
Coupe	6,292	6,357	6,167
90 CHEVY CORSICA			
Hatchback 5 Dr.	7,341	7,416	7,196
89 CHEVY CORSICA			
Sedan	5,996	6,056	5,876
90 CHEVY CAVALIER			
Sedan	6,411	6,477	6,284
89 CHEVY CAVALIER			
Sedan	5,105	5,157	5,004
89 CHEVY CELEBRITY			
Sedan	6,091	6,152	5,969
88 CHEVY CELEBRITY			
Sedan	4,812	4,860	4,717
90 CHEVY CAPRICE			
Sedan	8,815	8,903	8,639
88 CHEVY CAPRICE			
Sedan	6,909	6,979	6,770
90 CHRYSLER LE BARON			
Sedan	9,575	9,670	9,385
89CHRYSLER LE BARON			
Highline Sedan	6,252	6,314	6,125
90 CHRYSLER NEW YORKER			
Salon Sedan	11,460	11,574	11,232
89 CHRYSLER NEW YORKER			
Sedan	9,825	9,923	9,629
89 CHRYSLER FIFTH AVENUE			
Sedan	9,889	9,984	9,688
88 CHRYSLER FIFTH AVENUE			
Sedan	7,906	7,987	7,748
89 DODGE ARIES AMERICA			
Sedan	4,815	4,862	4,717
88 DODGE ARIES AMERICA			
Sedan	3,778	3,817	3,702
90 DODGE SHADOW			
Liftbk 5 Dr	6,405	6,471	6,279
89 DODGE SHADOW			
Liftbk 5 Dr	5,184	5,234	5,080
90 DODGE DYNASTY			
Sedan	8,950	9,040	8,770
90 FORD ESCORT			
Htchbk 4 Dr LX	5,610	5,666	5,497
89 FORD ESCORT			
Htchbk 4 Dr LX	4,475	4,519	4,385
90 FORD MUSTANG			
LX-4 Coupe	7,412	7,487	7,266
89 FORD MUSTANG			
LX-4 Coupe	5,969	6,027	5,848
90 FORD TEMPO			
GL Sedan 4 Dr	6,707	6,775	6,573
89 FORD TEMPO			
GL Sedan 4 Dr	5,303	5,356	5,197
90 FORD TAURUS			
GL Sedan 4 Dr	9,168	9,260	8,987
89 FORD TAURUS			
GL Sedan 4 Dr	6,977	7,047	6,835
90 FORD CROWN VICTORIA			
Sedan	11,322	11,436	11,095
89 FORD CROWN VICTORIA			
Sedan	9,185	9,276	9,002
90 THUNDERBIRD			
Coupe	9,964	10,064	9,765
89 THUNDERBIRD			
Coupe	8,302	8,384	8,135
90 LINCOLN			
Town Car Sedan	17,179	17,350	16,836
Mark VII LSC Coupe	16,726	16,894	16,391
Continental Sedan	15,852	16,011	15,534
89 LINCOLN			
Town Car Sedan	13,021	13,153	12,761
Mark VII LSC Coupe	14,134	14,276	13,853
Continental Sedan	14,067	14,208	13,786
90 MAZDA 626			
LX Sedan 4 Dr	10,332	10,436	10,127
90 MERCURY COUGAR			
LS Coupe	10,431	10,534	10,220
89 MERCURY COUGAR			
LS Coupe	8,729	8,816	8,555
90 MERCURY TOPAZ			
GS Sedan 4 Dr	6,858	6,928	6,723
89 MERCURY TOPAZ			
GS Sedan 4 Dr	5,445	5,499	5,336
90 MERCURY SABLE			
GS Sedan 4 Dr	9,256	9,349	9,071
89 MERCURY SABLE			
GS Sedan 4 Dr	7,031	7,101	6,889
90 MERCURY GRAND MARQUIS			
GS Sedan	11,768	11,885	11,533
89 MERCURY GRAND MARQUIS			
GS Sedan	9,649	9,745	9,456
90 MITSUBISHI MIRAGE			
Sedan 4 Dr	6,191	6,253	6,068
89 MITSUBISHI MIRAGE			
Sedan 4Dr	4,879	4,928	4,782
90 NISSAN SENTRA			
Sedan 2 Dr	5,543	5,599	5,433
90 NISSAN STANZA			
XE Sedan 4 Dr	9,217	9,309	9,033
90 NISSAN MAXIMA			
SE Sedan	14,666	14,813	14,373
89 NISSAN SENTRA			
Sedan 2 Dr	4,236	4,276	4,151
99 NISSAN STANZA			
Ntch 4 Dr	7,215	7,287	7,071
89 NISSAN MAXIMA			
SE Sedan	12,303	12,426	12,058
90 OLDS CIERA			
S Coupe	8,335	8,419	8,168
Sedan	7,983	8,064	7,825
89 OLDS CIERA			
Coupe	6,533	6,599	6,402
Sedan	6,606	6,672	6,474
90 OLDS CALAIS			
Sedan	6,758	6,824	6,623
89 OLDS CALAIS			
Sedan	6,758	6,824	6,623
90 OLDS CUTLASS SUPREME			
Coupe	9,085	9,177	8,904
89 OLDS CUTLASS SUPREME			
Coupe	7,295	7,369	7,149
90 OLDS 98 REGENCY			
Sedan	13,789	13,930	13,515
89 OLDS 98 REGENCY			
Sedan	10,629	10,736	10,415
89 PLYMOUTH RELIANT			
Sedan	4,791	4,839	4,695
88 PLYMOUTH RELIANT			
Sedan	3,778	3,816	3,704
90 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	6,405	6,471	6,279
89 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	5,184	5,234	5,080
89 PLYMOUTH GRAN FURY			
Salon Sedan	5,008	5,059	4,909
88 PLYMOUTH GRAN FURY			
Salon Sedan	4,004	4,043	3,924
90 ACCLAIM			
Sedan	7,213	7,286	7,070
90 PONTIAC SUNBIRD			
LE Sedan	6,574	6,639	6,440
SE Coupe	6,791	6,861	6,655
89 PONTIAC SUNBIRD			
LE Coupe	5,416	5,470	5,307
SE Sedan	5,561	5,618	5,451
90 PONTIAC 6000			
LE Sedan	8,377	8,460	8,207
89 PONTIAC 6000			
LE Sedan	6,305	6,367	6,179
90 PONTIAC GRAND AM			
LE Sedan	7,566	7,644	7,416
89 PONTIAC GRAND AM			
Sedan	6,319	6,382	6,193
90 PONTIAC BONNEVILLE			
LE Sedan	10,997	11,108	10,776
89 PONTIAC BONNEVILLE			
LE Sedan	8,415	8,497	8,247
90 PONTIAC GRAND PRIX			
Coupe	9,393	9,486	9,205
89 PONTIAC GRAND PRIX			
Coupe	7,428	7,504	7,279
90 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	7,649	7,726	7,497
90 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	9,802	9,899	9,605
90 TOYOTA CRESSIDA			
Lux Sedan	15,537	15,692	15,226
89 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	6,312	6,376	6,186
9 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	8,057	8,137	7,894
89 TOYOTA CRESSIDA			
Lux Sedan	13,186	13,317	12,922
90 VOLKSWAGEN JETTA			
Sedan 4 Dr	8,399	8,482	8,230
89 VOLKSWAGEN JETTA			
Sedan 4 Dr	7,172	7,243	7,028
90 VOLVO			
240 DL Sedan	12,549	12,674	12,297
89 VOLVO			
240 DL Sedan	11,229	11,343	11,005

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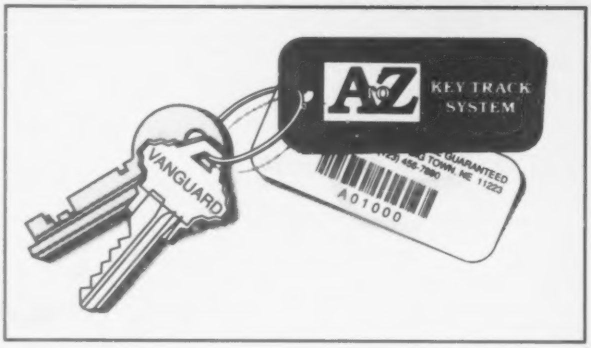

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New Haven, CT	137.2	117.7
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Salina, KS	131.4	97.9
Shreveport, LA	141.9	108.9
Jackson, MI	152.0	99.9
Kansas City, MO	132.0	93.0
Grand Forks, ND	127.4	98.9
Pittsburgh, PA	135.7	109.9
Corpus, Christi, TX	127.9	99.4
Milwaukee, WI	136.2	101.5
Seattle, WA	147.8	112.6

The average U.S. full-serve gasoline price for the month of March was 135.2 cents per gallon.
The average U.S. self-serve gasoline price for the month of March was 110.7 cents per gallon.
Survey conducted during the first five working days of March 1990.
Supplied by Runzheimer International, Runzheimer Park, Rochester, WI.

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Manheim/GECARS Merge: The New Auction Giant

What's Hot in Stepvans

Open- vs. Closed-End Leasing: The Battle Continues

McCullagh Retains Independence with GE

1990's Top-Selling Fleet Dealers

Patsy Mance
Bristol Myers Squibb
AF's 1991 Professional Fleet
Manager of the Year

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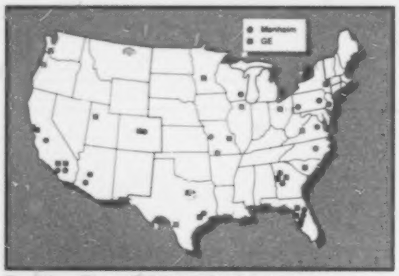
CAR AND LIGHT TRUCK FLEET AND LEASING MANAGEMENT MAGAZINE

May 1991
VOL. 30, NO. 7

Influencing the management of 5,072,000 cars and 2,209,000 light trucks and vans in business, leasing, rental, utility, government, police, and taxi fleets.



P. 26—The GECARS/Manheim merger created a network of 46 auctions.

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The first woman to win Automotive Fleet's *Professional Fleet Manager Award, Mance becomes the seventh recipient of the magazine's recognition of fleet manager excellence.*

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P. 55—Easy entry and exit, and ample cargo space make stepvans popular vehicles for pickup and delivery.

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An inside look at the specifications and capacities of popular models from the four main manufacturers of delivery stepvans.

automotive
FLEET

On the Cover—The Professional Fleet Manager of the Year, Bristol Myers Squibb's Manager of Corporate Fleet Services Patsy Mance, stands in front of a New York backdrop. See page 22 for additional coverage of the Award and its winner.

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Top Fleet Dealer Repeats in 1990

Ed Morse Chevrolet earned the honor of being the nation's top fleet dealer overall for the fourth consecutive year. AF recognized the top three fleet dealers by franchise at the recent Automotive Fleet & Leasing Association convention.

Ed Morse Chevrolet of Ft. Lauderdale, FL, has been named as the nation's top fleet dealer for the fourth consecutive year. During the 1990 calendar year, the dealership sold 60,085 fleet units, nearly doubling its 1989 tally of 35,489 vehicles sold.

The industry's top 54 fleet dealers were honored at an awards reception at the Automotive Fleet & Leasing Association's (AFLA) annual spring convention in Atlanta, GA. The award is presented annually by *Automotive Fleet* and recognizes the dealers who are among the top three sellers within their franchise organization, based on calendar year fleet sales figures.

Following Ed Morse Chevrolet in second place was Jordan Ford of Mishawka, IN, with fleet sales figures of 49,815. Third place was earned by Fairway Ford of Latrobe, PA, with fleet sales of 31,442 vehicles. Fourth place was awarded to another Chevrolet dealer, Prospect Motors of Jackson, CA, which sold 31,213 fleet vehicles during 1990.

The awards for the fleet sales were presented on April 27, 1991, at the 23rd Annual AFLA convention at the Ritz Carlton Hotel in Atlanta, GA. Plaques were presented to the top three winners from each of the major fleet lines.

1991 FLEET DEALER AWARDS

(For sales occurring in the 1990 calendar year.)

Buick	Dewey Hibben	Lupient Buick, Inc.	Minneapolis, MN	6,317
	Ken Carlson	Orange Buick-GMC Truck	Orlando, FL	4,983
	Harold Schaudenecker	Loren Buick, Inc.	Glenview, IL	4,898
	Manuel Escoto	Prospect Motors, Inc.	Jackson, CA	4,390
	Mary Anne DuCharme	Wm. Lehman Buick, Inc.	Miami, FL	3,536
	Walt Wray	Boulevard Buick-GMC Truck	Long Beach, CA	3,017
	Naomi Berndt	Grant Dean Buick, Inc.	Highland Park, IL	1,906
	Tom Bishop	Bishop Motors, Inc.	Barberton, OH	1,639
	Mike Kelley	Reef Buick, Inc.	Lauderdale Lakes, FL	1,589
	Dave Smith	McClellan Buick, Inc.	La Mesa, CA	1,485
Cadillac	Lori Kressin	Long Cadillac	Roseville, MN	8,791
	Jack Evans	Bayview Cadillac	Ft. Lauderdale, FL	8,407
	Manuel Escoto	Prospect Motors	Jackson, CA	6,589
	Connie Rogers	Heritage Cadillac	Lombard, IL	4,890
	Phil Davis	Polkowitz Motors	Perth Amboy, NJ	4,187
	Rich Grosse	Nesen Cadillac	Thousand Oaks, CA	1,960
	Meri Huskey	R. Penske Cadillac	Downey, CA	1,497
	Donna Janazzo	World of Wheels	Bristol, CT	1,421
	Anita Davis	R. Meier Cadillac	Dallas, TX	1,087
	Jack Rutledge	T. Peacock Cadillac	Houston, TX	1,079
Chevrolet	Jack Evans	Ed Morse Chevrolet	Lauderhill, FL	60,085
	Manuel Escoto	Prospect Motors	Jackson, CA	31,213
	David Lindahl	Diamond Chevrolet	Inglewood, CA	10,225
	S. Yassinger	Z. Frank Chevrolet	Chicago, IL	8,458
	Stu Copp	Rainbow Chevrolet	Honolulu, HI	6,359
	Jim Franseth	Povey Chevrolet	Red Bluff, CA	5,187
	Lloyd Chavez	Burt Chevrolet	Englewood, CO	4,947
	Gus Hubbard	David Penske Chevrolet	King of Prussia, PA	4,861

DEALER AWARDS

1991 FLEET DEALER AWARDS

(For sales occurring in the 1990 calendar year.)

Chevrolet (Cont.)	Chris Hackett	Newman Chevrolet	Garland, TX	4,593
	Rick Nicoletti	Faul Chevrolet	Palatine, IL	4,574
Dodge	Gene Hall	Luke Potter Dodge, Inc.	Winter Park, FL	24,074
	Dottie Fitzgerald	Colonial Dodge	Kenningston, MD	16,287
	Steve Leach	Forest Lake CPD	Forest Lake, MN	10,352
	Jack Evans	Ed Morse Dodge, Inc.	Coconut Creek, FL	4,998
	Dick Weber	Brenninger Motors, Inc.	Lansdale, PA	4,617
	Dewey Hibben	Bothon Dodge, Inc.	Eau Claire, WI	4,388
	John Tomlinson	Dadeland Dodge, Inc.	Miami, FL	3,756
	Debbie Applewhite	Metrolina Dodge, Inc.	Charlotte, NC	2,613
	Vince D'Andra	Cherry Hill Dodge, Inc.	Cherry Hill, NJ	2,594
	Jerry Ulm	Jerry Ulm Dodge, Inc.	Tampa, FL	2,151
Chrysler/ Plymouth	Vic Cinquemano	Precision CPD, Inc.	Winter Haven, FL	21,546
	Manuel Escoto	Amador Motors	Sutter Creek, CA	16,500
	Darryl Draper	Johnny's County Motor Sales	Oaklyn, NJ	4,732
	Ronald Pope	Russ Darrow Waukesha, Inc.	Waukesha, WI	3,872
	Bob Haller	Bloomington Chrysler/Plymouth, Inc.	Bloomington, MN	3,779
	Tony Varner	Allen Cubbage CPD	Stanley, VA	2,636
	Ginger Bower	South Bay Chrysler/Plymouth., Inc.	Torrance, CA	1,970
	Jim Wallace	Galeana Chrysler/Plymouth, Inc.	Ft. Myers, FL	1,832
	George Moser	Dayton Andrews C/P, Inc.	Clearwater, FL	1,742
	Vern Christianson	Ed Barwick Chrysler/Plymouth., Inc.	Napa, CA	1,696
Jeep/Eagle	Michael Bridges	Liberty Jeep/Eagle	Libertyville, IL	749
	Vic Cinquemano	Precision Jeep	Lakeland, FL	668
	Steve Leach	Southview Jeep/Eagle	Inver Grove Hgts., MN	419
	Rich Waters	Ancira Motor Co.	San Antonio, TX	303
	Fred Gerbaz	Berthod Motors, Inc.	Glenwood Springs, CO	237
	Ken Perry	Broadway Jeep/Eagle	Littleton, CO	186
	Don Ziminsk	Emich Jeep/Eagle, Inc.	Lakewood, CO	121
	Greg Signore	Elm Auto Sales	Kearny, NJ	116
	John Newsome	Pope Jeep/Eagle, Inc.	Stone Mountain, GA	109
	Marlene Strano	Dale Jeep/Eagle	Bronx, NY	(Tie) 106
	Sue Stone	West Side Jeep/Eagle, Inc.	Elmhurst, IL	(Tie) 106
Ford	James Hoffer	Jordan Ford	Mishawaka, IN	49,815
	Thomas Stablein	Fairway Ford	Latrobe, PA	31,442
	Bob Karlin/Wayne Harding	Santa Monica Ford	Santa Monica, CA	19,075
	Aldo Fontana	S&C Motors	San Francisco, CA	18,019
	Ted Daniel	Griffin Ford	Frostproof, FL	17,500
	Arnie Anderson	Highland Park Ford	Highland Park, IL	10,147
	Ed McCann/Ed Tennyson	Pacifico Ford	Philadelphia, PA	7,718
	Harold Beaune	Lutz Ford	Palo Alto, CA	7,381
	Jim Thompson	Ottawa Ford	Ottawa, IL	6,304
	Dominic Cantrella	Loman Ford	Woodbridge, NJ	6,280
GMC Truck	Mitch Grotte	Thomas Pontiac-Buick-GMC Truck, Inc.	Coon Rapids, MN	1,800
	Rick Cusick	Fountain Olds/GMC Truck	Orlando, FL	829
	Steve McGowan	Red Holman Pontiac-GMC Truck, Inc.	Westland, MI	650
Isuzu	Rick Cusick	Fountain Motors	Orlando, FL	880
	Gary Grady	Grady Isuzu	Mobile, AL	578
	David Beaumont	Tom Endicott Buick/Isuzu	Pompano Beach, FL	494
	Tim Walker	Gwinnett Mall	Duluth, GA	299
	Duke Page	Sun State Isuzu	Orlando, FL	209
	Mark Smith	Sam White Isuzu	Houston, TX	172
	Bud Killian	Mitchell Motors	Chamblee, GA	140
	Fred Greybill	Rey Reece Isuzu	Portland, OR	132
	William R. King	Superior Isuzu	Gretna, LA	127
	Greg Mitchell	Chapman Isuzu	Tempe, AZ	107
Lincoln/ Mercury	Veronica Howe	Libertyville Lincoln-Mercury	Libertyville, IL	24,095
	Ted Daniel	Island Lincoln-Mercury	Merritt Island, FL	19,080
	Bob Culbertson	Marty Franich Lincoln-Mercury	Watsonville, CA	18,632

1991 FLEET DEALER AWARDS

(For sales occurring in the 1990 calendar year.)

Lincoln/ Mercury (Cont.)	Jim Guedry	Pavilion Lincoln-Mercury	Austin, TX	7,016
	Ed Hartnet	Baranco Lincoln-Mercury	Duluth, GA	5,714
	Al Brooks	Northgate Lincoln-Mercury	Tampa, FL	3,269
	Dave McAvoy	Roto Lincoln-Mercury	Arlington Heights, IL	2,837
	Charles Blackwood	George Grubbs Lincoln-Mercury	Dallas, TX	2,685
	Rick Manley	Findlay Lincoln-Mercury	Findlay, OH	2,627
	Joe David	Pacifico Lincoln-Mercury	Philadelphia, PA	2,551
Mazda	Howard Blakeney	Frank Bommarito Mazda	Ellisville, MO	3,403
	Doug Engle	Don Darr Mazda	St. Louis, MO	1,439
	Manny Hernandez	Assael Mazda	Monrovia, CA	980
	Lamar Ripley	Livermore Mazda	Livermore, CA	805
	John Machado	Delray Mazda	Delray Beach, FL	609
	Jim Schwartz	Schwartz Mazda	Red Bank, NJ	298
	Joe David	Pacifico Mazda	Philadelphia, PA	248
	Ron Weiss	Freeman Mazda	Irving, TX	236
	Lou Verrengia	Puente Hills Mazda	City of Industry, CA	224
	Don Shipman	Dennis Mazda	Olathe, KS	202
Mitsubishi	Tom Zeeff	Cunningham Mitsubishi	Kansas City, MO	575
	Linda Olsen	Max Madsen Mitsubishi	Downers Grove, IL	372
	James Scarcelli	Carlsbad Mitsubishi	Carlsbad, CA	351
	Jan Smith	Bill Seidle's Mitsubishi	Marietta, GA	345
	Edward Handley	Boch Mitsubishi	Norwood, MA	320
	Ronald Carrachico	Gateway Mitsubishi	Toms River, NJ	296
	Cyle Sharp	Teague-Strebeck Mitsubishi	Clovis, NM	292
	Milos Radojevich	Patrick Mitsubishi	Schaumburg, IL	290
	Bruce Fainter	Colonial Mitsubishi	Charlottesville, VA	285
	Don Soper	Michael Mitsubishi	Fresno, CA	184
Nissan	Steve Leach	Northtown Nissan	Minneapolis, MN	2,941
	Eddie Torres	West Covina Nissan	West Covina, CA	1,061
	Eric Nicholson	Corona Nissan	Corona, CA	1,014
	Jim Masters	David McDavid	Houston, TX	904
	Russ Evans	Winner Nissan	Newark, DE	786
	Ben Kay	Bob Brest Nissan	Lynn, MA	612
	Scott Vander Sande	Lamb Nissan	San Diego, CA	600
	Bill Stamps	Colonial Nissan	Feasterville, PA	537
	Rob Randolph	Serramonte Nissan	Colma, CA	510
	Dan DelGrosso	Hippodrome Nissan	Nashville, TN	420
Oldsmobile	Dewey Hibben	Lupient Oldsmobile	Golden Valley, MN	15,780
	Manuel Escoto	Prospect Motors	Jackson, CA	15,414
	Marlene Strano	Dale Oldsmobile	Bronx, NY	12,712
	Dave Wilson	Dan Burns Oldsmobile	Delray Beach, FL	6,386
	Mark Smith	Sam White Oldsmobile Company	Houston, TX	3,575
	Brad Miller	Ray Oldsmobile	Park Ridge, IL	3,495
	Dave Dunn	Emich Oldsmobile	Golden, CO	2,747
	Becky Green	McDavid Oldsmobile	Houston, TX	2,610
	Rick Nicoletti	Larry Faul Oldsmobile	Schaumburg, IL	2,411
	Ed Handley	Boch Oldsmobile	Norwood, MA	2,345
Pontiac	Manuel Escoto	Prospect Motors	Jackson, CA	21,004
	Bud Morrison	J.M. Pontiac	Hollywood, FL	19,967
	Donna Janazzo	Stephen Pontiac Cadillac, Inc.	Bristol, CT	18,512
	Ron Ellis	Rudy Luther's Pontiac-GMC Truck	Minneapolis, MN	11,999
	Sam Emerick	Goode-Taylor Pontiac-GMC Truck	Dallas, TX	7,310
	Hanley Dawson III	Patrick Pontiac	Libertyville, IL	5,247
	Joanne Donohue	Smythe Buick, Pontiac-GMC Truck, Inc.	Santa Clara, CA	4,755
	Rick Nicoletti	Larry Faul Pontiac, Inc.	Schaumburg, IL	4,253
	Tamara Parker	Peninsula Pontiac-Oldsmobile, Inc.	Torrance, CA	4,128
	Skip Brown	Courtesy Pontiac, Jeep	Honolulu, HI	3,974
Subaru	Ken Sanders	Evander Holyfield Subaru	Morrow, GA	2,380
	Linda Cody	Burt Subaru	Denver, CO	1,015
	Jim Thwing	Mark Chris Subaru	Ontario, CA	600

1991 FLEET DEALER AWARDS

(For sales occurring in the 1990 calendar year.)

Subaru (Cont.)	Wayne Drum	Continental Motors	Anchorage, AK	420
	Dennis Assael	Assael Subaru	Monrovia, CA	400
	Rich Gross	Nesen Subaru	Westlake Village, CA	246
	George Trapp	Niello Porsche-Audi-Subaru	Concord, CA	147
	Jerry McCormick	Glen Subaru	Pocatello, ID	129
	Jim Clark	Del Amo Subaru	Torrance, CA	60
	Dave Berberich	Target Subaru	Boise, ID	40
Toyota	Lloyd Caren	Kendall Toyota	Miami, FL	18,039
	Jeff Lyman	Longo Toyota	El Monte, CA	7,918
	Darrell Brooks	Sterling McCall Toyota	Houston, TX	6,837
	Jack Evans	Delray Toyota	Delray Beach, FL	4,237
	Dave Shapowal	Thompson Toyota, Inc.	Doylestown, PA	4,170
	Steve Graham	Toyota Center, Inc.	West Columbia, SC	3,891
	Chris Hahn	Beechmont Toyota, Inc.	Cincinnati, OH	3,279
	Ed Pearson	Sloane Toyota, Inc.	Glenside, PA	2,551
	Mark Grant	Ft. Pierce Toyota, Inc.	Ft. Pierce, FL	2,287
	John Himmelmann	Lakewood Toyota	Lakewood, NJ	2,058
Volkswagen	Rick Cruz	South Motor Co.	Miami, FL	3,289
	Duke Ohmer	Masterson Motors	Ventura,CA	1,016
	Tony Bogner	Ganley Westside Imports	N. Olmsted, OH	646
	Jim Haller	University VW	Albuquerque, NM	138
	Kevin Garret	Sonnen VW	San Rafael, CA	116
	Ron Ellis	Rudy Luther's Fleet Sales	Minneapolis, MN	94
	Steve Lyman	Verdone VW	Phoenix, AZ	78
	Jeff Neel	VW Gallery	Norwood, MA	74
	Chuck Stockdale	Nefter VW	Thousand Oaks, CA	65
	Laurie Wereges	Mike Haggerty VW	Oak Lawn, IL	59

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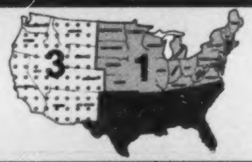
USED-CAR PRICES

The following are average used-car prices for the period ending April 10,1991. Prices are based on wholesale activity at major dealers across the country. They are divided into three zones as indicated on the accompanying map. These averages are calculated electronically. They are based on clean cars only. Proper allowance should be made for upgrading sharp cars and proper deduction taken for fair cars. Automatic transmissions have been included in the averages of all models. This information is published in *Automotive Fleet* by special permission of *Automotive Market Report.*



89 BUICK SKYHAWK			
Coupe	5,501	5,554	5,388
Sedan	5,576	5,633	5,464
88 BUICK SKYHAWK			
Coupe	4,508	4,555	4,419
Sedan	4,571	4,617	4,481
90 BUICK SKYLARK			
Cust Sedan	7,602	7,677	7,451
89 BUICK SKYLARK			
Cust Sedan	6,382	6,447	6,256
90 BUICK CENTURY			
Cust Sedan	8,236	8,319	8,071
89 BUICK CENTURY			
Cust Sedan	6,560	6,626	6,429
90 BUICK LESABRE			
Cust Sedan	10,873	10,983	10,657
89 BUICK LESABRE			
Cust Sedan	8,529	8,614	8,357
90 CADILLAC DEVILLE			
Coupe	16,693	16,860	16,361
Sedan	16,863	17,032	16,526
89 CADILLAC DEVILLE			
Coupe	14,286	14,428	14,001
Sedan	14,442	14,589	14,154
90 CADILLAC SEVILLE			
Sedan	17,535	17,709	17,182
89 CADILLAC SEVILLE			
Sedan	14,514	14,660	14,224
90 CHEVY BERETTA			
Coupe	7,503	7,578	7,352
90 CHEVY CORSICA			
Hatchback 4 dr.	7,341	7,416	7,196
89 CHEVY BERETTA			
Coupe	6,304	6,370	6,179
89 CHEVY CORSICA			
Hatchback 4 dr.	6,008	6,068	5,887
90 CHEVY CAVALIER			
Sedan	5,834	5,891	5,717
89 CHEVY CAVALIER			
Sedan	5,080	5,131	4,979
89 CHEVY CELEBRITY			
Sedan	6,000	6,060	5,879
88 CHEVY CELEBRITY			
Sedan	4,769	4,817	4,675
90 CHEVY CAPRICE			
Sedan	8,709	8,797	8,536
89 CHEVY CAPRICE			
Sedan	6,847	6,916	6,709
90 CHRYSLER LE BARON			
Sedan	9,526	9,621	9,337
89 CHRYSLER LE BARON			
Highline Sedan	6,252	6,314	6,125
90 CHRYSLER NEW YORKER			
Salon Sedan	11,380	11,493	11,153
89 CHRYSLER NEW YORKER			
Sedan	9,767	9,863	9,571
89 CHRYSLER FIFTH AVENUE			
Sedan	9,820	9,914	9,621
88 CHRYSLER FIFTH AVENUE			
Sedan	7,812	7,891	7,656
89 DODGE ARIES AMERICA			
Sedan	4,767	4,614	4,670
88 DODGE ARIES AMERICA			
Sedan	3,726	3,763	3,650
90 DODGE SHADOW			
Liftbk 5 Dr	6,373	6,439	6,248
89 DODGE SHADOW			
Liftbk 5 Dr	5,158	5,208	5,055
89 DODGE DYNASTY			
Sedan	8,869	8,959	8,692
90 FORD ESCORT			
Htchbk 4 Dr LX	5,565	5,621	5,454
89 FORD ESCORT			
Htchbk 4 Dr XL	4,462	4,505	4,372
90 FORD MUSTANG			
LX-4 Coupe	7,338	7,413	7,193
89 FORD MUSTANG			
LX-4 Coupe	5,927	5,985	5,807
90 FORD TEMPO			
GL Sedan 4 Dr	6,654	6,721	6,520
89 FORD TEMPO			
GL Sedan 4 Dr	5,271	5,324	5,165
90 FORD TAURUS			
GL Sedan 4 Dr	9,095	9,186	8,915
89 FORD TAURUS			
GL Sedan 4 Dr	6,893	6,963	6,753
90 FORD CROWN VICTORIA			
Sedan	11,186	11,299	10,963
89 FORD CROWN VICTORIA			
Sedan	9,075	9,165	8,894
90 THUNDERBIRD			
Coupe	9,884	9,984	9,687
89 THUNDERBIRD			
Coupe	8,203	8,283	8,038
90 LINCOLN			
Town Car Sedan	17,110	17,281	16,769
Mark VII LSC Coupe	16,659	16,826	16,325
Continental Sedan	15,789	15,947	15,472
89 LINCOLN			
Town Car Sedan	12,930	13,061	12,672
Mark VII LSC Coupe	14,035	14,177	13,756
Continental Sedan	13,969	14,109	13,690
90 MAZDA 626			
LX Sedan 4 Dr	10,332	10,436	10,127
90 MERCURY COUGAR			
LS Coupe	10,358	10,460	10,148
89 MERCURY COUGAR			
LS Coupe	8,668	8,755	8,495
90 MERCURY TOPAZ			
GS Sedan 4 Dr	6,816	6,886	6,683
89 MERCURY TOPAZ			
GS Sedan 4 Dr	5,413	5,467	5,304
90 MERCURY SABLE			
GS Sedan 4 Dr	9,182	9,274	8,999
89 MERCURY SABLE			
GS Sedan 4 Dr	6,947	7,016	6,807
90 MERCURY GRAND MARQUIS			
GS Sedan	11,627	11,743	11,395
89 MERCURY GRAND MARQUIS			
GS Sedan	9,553	9,648	9,362
90 MITSUBISHI MIRAGE			
Sedan 4 Dr	6,191	6,253	6,068
89 MITSUBISHI MIRAGE			
Sedan 4 Dr	4,806	4,854	4,710
90 NISSAN SENTRA			
Sedan 2 Dr	5,515	5,571	5,406
90 NISSAN STANZA			
XE Sedan 4 Dr	9,217	9,309	9,033
90 NISSAN MAXIMA			
SE Sedan	14,666	14,813	14,373
89 NISSAN SENTRA			
Sedan 2 Dr	4,236	4,276	4,151
89 NISSAN STANZA			
Hatchback 4 Dr	7,215	7,287	7,071
89 NISSAN MAXIMA			
SE Sedan	12,241	12,364	11,998
90 OLDS CIERA			
S Coupe	8,301	8,385	8,136
Sedan	7,951	8,032	7,793
89 OLDS CIERA			
Coupe	6,487	6,553	6,357
Sedan	6,560	6,626	6,429
90 OLDS CALAIS			
Sedan	6,758	6,824	6,623
89 OLDS CALAIS			
Sedan	5,850	5,909	5,734
90 OLDS CUTLASS SUPREME			
Coupe	9,058	9,149	8,877
89 OLDS CUTLASS SUPREME			
Coupe	7,302	7,376	7,156
90 OLDS 98 REGENCY			
Sedan	13,679	13,819	13,407
89 OLDS REGENCY			
Sedan	10,555	10,661	10,342
89 PLYMOUTH RELIANT			
Sedan	4,743	4,791	4,649
88 PLYMOUTH RELIANT			
Sedan	3,726	3,762	3,652
90 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	6,373	6,439	6,248
89 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	5,158	5,208	5,055
89 PLYMOUTH GRAN FURY			
Salon Sedan	4,968	5,019	4,869
88 PLYMOUTH GRAN FURY			
Salon Sedan	3,956	3,995	3,878
90 ACCLAIM			
Sedan	7,213	7,286	7,070
90 PONTIAC SUNBIRD			
LE Sedan	6,541	6,606	6,408
SE Coupe	6,757	6,826	6,622
89 PONTIAC SUNBIRD			
SE Sedan	5,400	5,454	5,291
SE Coupe	5,544	5,601	5,435
90 PONTIAC 6000			
LE Sedan	8,327	8,410	8,157
89 PONTIAC 6000			
LE Sedan	6,255	6,316	6,129
90 PONTIAC GRAND AM			
LE Sedan	7,566	7,644	7,416
89 PONTIAC GRAND AM			
Sedan	6,319	6,382	6,193
90 PONTIAC BONNEVILLE			
LE Sedan	10,931	11,042	10,712
89 PONTIAC BONNEVILLE			
LE Sedan	8,365	8,447	8,197
90 PONTIAC GRAND PRIX			
Coupe	9,365	9,458	9,177
89 PONTIAC GRAND PRIX			
Coupe	7,435	7,511	7,286
90 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	7,595	7,672	7,445
90 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	9,753	9,850	9,557
90 TOYOTA CRESSIDA			
Lux Sedan	15,428	15,582	15,119
89 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	6,280	6,344	6,155
89 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	8,057	8,137	7,894
89 TOYOTA CRESSIDA			
Lux Sedan	13,120	13,250	12,857
90 VOLKSWAGEN JETTA			
Sedan 4 Dr	8,357	8,440	8,189
89 VOLKSWAGEN JETTA			
Sedan 4 Dr	7,122	7,192	6,979
90 VOLVO			
240 DL Sedan	13,232	13,364	12,967
89 VOLVO			
240 DL Sedan	11,083	11,196	10,862

NEW PRODUCTS

key may be inserted and withdrawn without removing the lock. Two installation configurations are offered: a basic model with a bracket that fits over the ignition slot and an optional break-away bolt, which makes the lock removable only after many hours of effort. The lock is available for most GM cars and is made of heavy-gauge steel with a protective vinyl coating. *Lok-Itt.*

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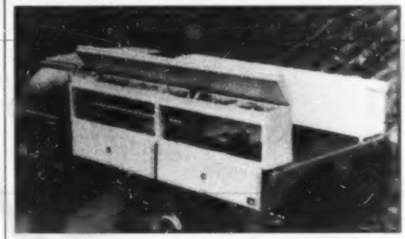

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Spacemaker models add full-length top-opening compartments with 10 adjustable dividers. Lower compartments can also be equipped with the optional shelf divider. *Reading Body Works.*

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Long Beach, CA	148.4	89.4
Denver, CO	157.9	106.8
Washington, D.C.	149.6	104.0
Tampa, FL	169.6	117.2
Maui, HI	190.9	139.9
Chicago, IL	157.8	116.6
Louisville, KY	140.6	105.2
Boston, MA	131.4	118.7
Billings, MT	134.6	111.9
Brooklyn, NY	130.4	116.9
Charleston, SC	131.5	101.9
Nashville, TN	142.7	106.9
Houston, TX	140.8	94.2

The average U.S. full-serve gasoline price for the month of April was 134.9 cents per gallon.
The average U.S. self-serve gasoline price for the month of April was 111.8 cents per gallon.
Survey conducted during the first five working days of April 1991.
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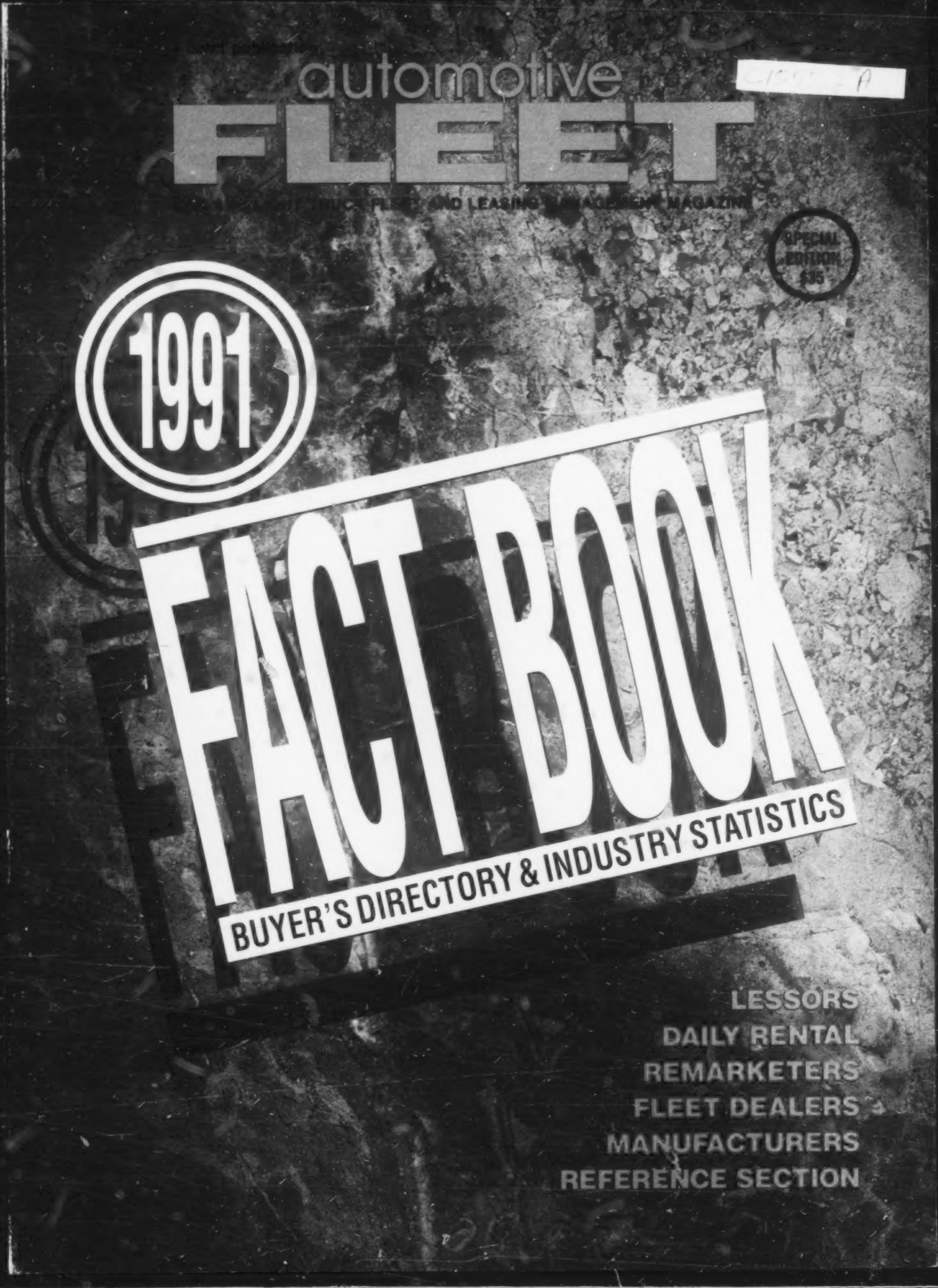

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CAR AND LIGHT TRUCK FLEET AND LEASING MANAGEMENT MAGAZINE

1991 VOLUME 30
SUPPLEMENT

Influencing the management of
5,090,000 cars and 2,209,000 light trucks
and vans in business, leasing, rental,
utility, government, police, and taxi fleets.

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Fleet Statistics by Type and Size (as of 1/1/91)

Cars

Type of Fleet	Leased or Managed	Company-Owned	Employee-Owned	Total
Businesses with 25 or More Cars	2,161,000	219,000	509,000	2,889,000
Businesses with 10 to 24 Cars	399,000	136,000	373,000	908,000
Other				
Government (Federal, state, county, and local.)	108,000	430,000	—	538,000
Utilities	94,000	457,000	—	551,000
Police	11,000	238,000	—	249,000
Taxi	22,000	119,000	—	141,000
Daily Rental	142,000	848,000	—	990,000
Fleet Total	**2,937,000**	**2,447,000**	**882,000**	**6,266,000**
Individually-Leased (Lessors, either independent or dealers, leasing 1 to 9 cars as business or consumer leases.)	2,020,000	—	—	2,020,000
INDUSTRY TOTAL	**4,957,000**	**2,447,000**	**882,000**	**8,286,000**

Trucks — Class I, II, III, IV, V

Type of Fleet	Leased or Managed	Owned	Total
Businesses with 25 or More Class I-V Trucks (Includes leasing, construction, plumbing, heating, food distribution, pest control, cable TV, etc.)	686,000	255,000	941,000
Businesses with 10 to 24 Class I-V Trucks	191,000	82,000	273,000
Utilities	105,000	488,000	592,000
Government (Federal, state, county, and local.)	59,000	187,000	246,000
Daily Rental	13,000	138,000	151,000
Other (Police, taxi, etc.)	1,200	4,800	6,000
TOTAL	**1,055,200**	**1,198,000**	**2,209,000**

U.S. New Car/Truck Fleet Registrations

On all accounts buying 10 or more units each year. (In Thousands)

	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990[1]
CARS										
Renting/Leasing	895	841	1,014	1,251	1,590	1,594	1,595	1,770	1,845	1,917
(Renting)[2]									(1,050)	(1,160)
(Leasing)[2]									(795)	(757)
Commercial	215	185	194	217	206	176	157	191	158	136
Government[3]	73	71	66	79	79	81	73	82	79	90
TOTAL	**1,183**	**1,097**	**1,274**	**1,547**	**1,875**	**1,851**	**1,825**	**2,043**	**2,082**	**2,143**
TRUCKS										
Renting/Leasing	150	150	160	281	435	411	405	473	491	434
Commercial	182	147	144	207	225	203	210	233	221	196
Government[3]	70	67	66	78	95	103	93	99	103	105
TOTAL	**402**	**364**	**370**	**566**	**755**	**717**	**708**	**805**	**815**	**735**
COMBINED CAR and TRUCK										
Renting/Leasing	1,045	991	1,174	1,532	2,025	2,005	2,000	2,244	2,336	2,351
Commercial	397	332	338	424	431	379	367	424	379	332
Government[3]	143	138	132	157	174	184	166	181	182	195
TOTAL	**1,585**	**1,461**	**1,644**	**2,113**	**2,630**	**2,568**	**2,533**	**2,849**	**2,897**	**2,878**

[1] Month of December registrations are estimated. [2] Renting & Leasing split from Renting/ Leasing total. [3] Excludes Federal Government.

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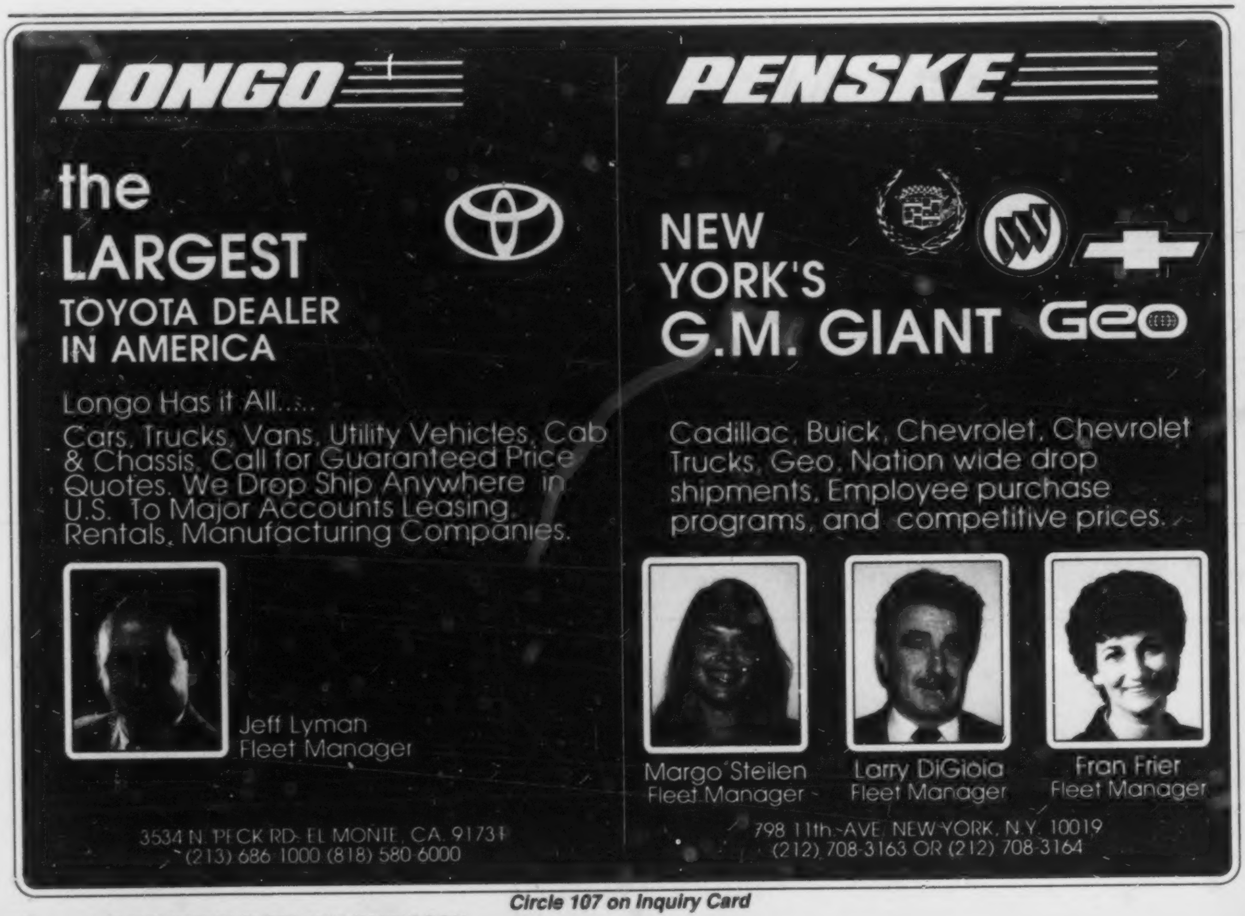
U.S. New Car Fleet Registrations[1] By Month And Year

Totals include all fleets of 10 or more units

	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
JAN	110,666	93,700	100,500	141,669	158,782	181,524	188,000	178,400	179,400	153,000
FEB	100,205	78,300	91,200	142,006	142,643	162,615	159,100	185,500	183,100	188,500
MAR	108,836	84,500	105,800	136,526	162,472	164,697	165,300	186,200	197,400	189,100
APR	102,059	96,900	93,800	142,199	146,644	156,141	154,100	154,300	179,600	168,900
MAY	113,894	104,800	100,800	139,114	145,063	155,968	158,700	169,800	199,000	183,000
JUN	124,838	117,700	137,200	156,445	163,165	194,567	191,400	224,000	232,000	222,600
JUL	94,546	95,700	101,400	131,377	129,988	151,395	149,800	167,600	151,000	173,400
AUG	70,411	66,800	84,300	100,845	206,597	108,112	107,800	135,300	111,500	140,300
SEP	80,102	65,900	88,600	123,995	132,383	90,078	92,900	121,700	123,400	161,500
OCT	82,802	81,400	111,100	133,247	156,727	122,717	135,400	145,700	164,900	213,200
NOV	111,798	110,900	136,700	153,865	169,024	165,194	155,900	165,900	180,100	202,000[2]
DEC	117,100	138,600	150,000	136,481	196,497	226,100	178,600	208,800	201,500	205,000[2]
	1,217,257	**1,135,200**	**1,301,400**	**1,637,769**	**1,909,985**	**1,879,108**	**1,837,000**	**2,043,200**	**2,102,900**	**2,200,500**

[1] Includes all government registrations [2] November & December estimated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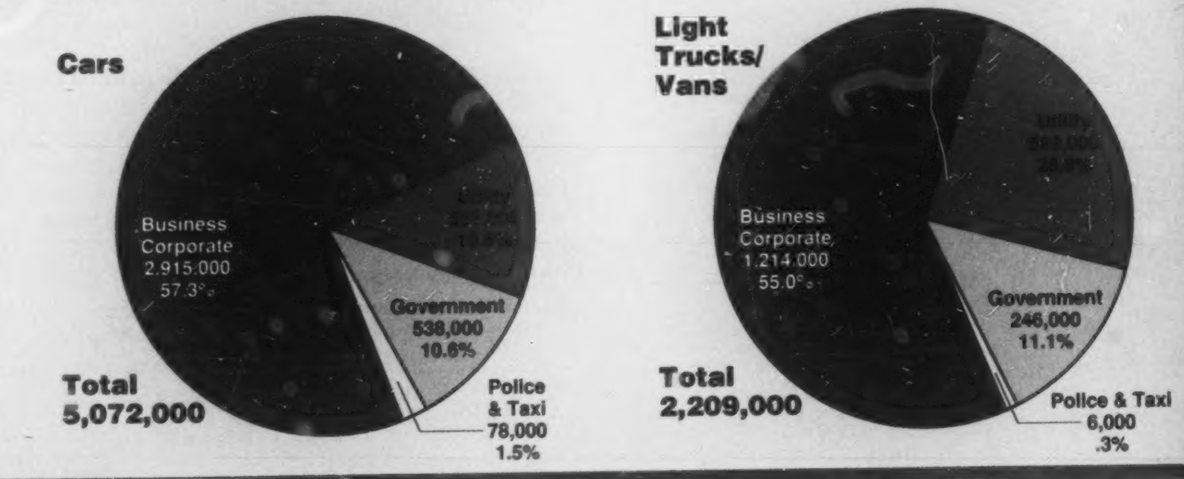
U.S. Cars in Fleets by Type of Business (Owned and Leased)

TYPE OF FLEET	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
	CARS (in thousands)									
Business Fleets—25 or more										
Salesman Owned	341	340	340	344	348	420	410	425	518	509
Company Owned	226	228	224	232	226	260	252	235	236	219
Leased by Companies (By Types of Lease)										
Finance & Management	1,617	1,525	1,553	1,545	1,630	1,600	1,632	1,893	1,856	1,849
Partial/Full Maintenance	230	319	315	313	352	305	313	161	140	155
Net/Fixed	139	136	134	156	168	145	148	146	158	157
TOTAL Fleet Leased	1,986	2,000	2,060	2,095	2,150	2,050	2,093	2,200	2,154	2,161
Business Fleets—10-24 cars										
Owned	452	450	448	452	452	480	475	481	526	535
Leased	282	288	293	297	308	320	334	348	353	399
Individually Leased	1,713	1,645	1,653	1,657	1,800	1,975	2,098	2,160	2,140	2,020
Other Fleets										
Government	649	500	500	528	528	535	538	543	543	538
Utilities	537	530	533	540	540	545	550	553	553	551
Police	284	223	221	228	233	238	240	242	244	249
Taxi	198	141	139	140	140	143	144	144	144	141
Daily Rental	462	457	466	755	760	790	800	870	907	990
Driver School	19	18	—*							
TOTAL	2,149	1,869	1,877	2,191	2,201	2,251	2,272	2,352	2,391	2,469
NOTE: Number of Cars in Fleets of 4 or More	10,436	10,076	10,400	10,475	10,508	10,560	10,578	10,597	10,592	10,607

Source: Automotive Fleet Research Department
**Combined with business fleets*

Composition of Automotive Fleet/Leasing Market

(Vehicles Controlled/Operated by AF Readership)



■ Passenger Car Fleet Registrations

1984 - 1990 Model Years

	1984	1985	1986	1987	1988	1989	1990
American Motors	33,739 2.0%	31,742 2.0%	13,716 1.0%	4,281 1.0%	—	—	—
American Isuzu	N/A	N/A	N/A	N/A	5,387 1.0%	4,237 1.0%	20 <1.0%
Buick	147,646 10.0%	155,342 9.0%	122,127 5.0%	95,170 5.0%	103,389 5.0%	109,299 5.0%	103,160 5.5%
Cadillac	45,408 3.0%	41,946 2.0%	39,540 2.0%	49,565 3.0%	55,828 2.0%	58,179 3.0%	77,503 4.0%
Chevrolet	284,690 16.0%	323,540 19.0 %	348,727 20.0%	355,359 21.0%	357,166 20.0%	344,291 17.0%	377,471 20.0%
Chrysler	42,545 3.0%	47,209 3.0%	61,035 4.0%	40,135 3.0%	57,848 3.0%	48,549 2.0%	54,176 3.0%
Dodge	93,997 6.0%	93,975 5.0%	103,000 5.0%	94,145 5.0%	115,368 6.0%	147,427 7.0%	120,731 6.5%
Eagle	—	—	—	—	1,145 1.0%	7,245 1.0%	4,660 <1.0%
Ford	322,710 19.0%	337,202 19.0%	265,712 16.0%	330,134 20.0%	389,691 21.0%	398,940 20.0%	382,204 20.0%
Lincoln-Mercury	155,302 10.0%	148,121 8.0%	135,182 8.0%	163,274 10.0%	164,527 9.0%	176,091 9.0%	159,014 8.5%
Mazda	N/A	N/A	N/A	N/A	N/A	16,991 1.0%	16,863 1.0%
Mitsubishi	N/A	N/A	3,447 1.0%	6,403 1.0%	2,617 1.0%	14,985 1.0%	31,855 2.0%
Nissan	61,719 4.0%	81,599 5.0%	80,141 5.0%	62,719 4.0%	69,289 4.0%	74,123 4.0%	66,811 3.5%
Oldsmobile	194,320 12.0%	189,137 10.0%	193,510 12.0%	137,842 8.0%	129,481 8.0%	126,179 6.0%	120,243 6.5%
Plymouth	91,594 5.0%	80,736 5.0%	92,777 5.0%	79,373 4.0%	88,962 4.0%	75,402 4.0%	62,242 3.5%
Pontiac	96,984 6.0%	134,508 8.0%	163,973 10.0%	152,001 8.0%	155,550 8.0%	174,286 9.0%	183,802 9.5%
Subaru	N/A	6,035 1.0%	10,505 1.0%	9,087 1.0%	18,588 1.0%	38,432 2.0%	13,757 <1.0%
Toyota	50,407 4.0%	69,540 4.0%	104,409 5.0%	99,466 6.0%	104,424 5.0%	113,946 6.0%	117,765 6.0%
Volvo	N/A	N/A	N/A	N/A	2,032 1.0%	4,411 1.0%	4,450 <1.0%
VW	N/A	N/A	N/A	N/A	N/A	7,724 1.0%	8,417 <1.0%
INDUSTRY TOTAL	1,621,061	1,740,632	1,737,801	1,678,954	1,821,292	1,940,737	1,905,144
PERCENTAGE TOTAL	100%	100%	100%	100%	100%	100%	100%

Basic registration data is furnished by each manufacturer, and they may use differing bases.
Note: Honda, Acura and Hyundai fleet figures are not available.

1990-Model Year Registrations Fleet vs. Retail

MODEL	Retail Totals	Fleet Totals	% Fleet vs. Retail
SUBCOMPACT			
Cabriolet	7,835	627	8.0%
Capri	3,355	330	9.8%
Cavalier	285,121	60,739	21.0%
Colt/Vista	49,242[1]	1,218	2.4%
Eclipse	49,542	2,333	4.5%
Escort	280,779	52,731	18.8%
Festiva	58,128	2,793	4.8%
Fiero	133	4	3.0%
Firenza	55	3	5.0%
Fox	27,541	1,102	4.0%
Geo Metro	73,938	24,272	33.0%
Geo Prizm	113,655	57,763	51.0%
Geo Spectrum	81,957	2,052	3.0%
Horizon	17,326[1]	3,745	21.6%
Impulse	1,456	0	0.0%
Justy	14,662	990	6.7%
Laser	39,524[1]	1,902	4.8%
LeMans	37,459	14,490	39.0%
Loyale	24,511	3,016	12.3%
Mirage/2-door	13,571	5,406	39.8%
MR2	9,688	1,022	10.5%
Mustang	122,434	17,985	14.7%
Omni	17,792[1]	4,052	22.7%
Precis	4,665	273	5.8%
Pulsar	9,266	407	4.4%
Sentra	166,853	18,925	11.3%
Skyhawk	2,699	88	3.0%
Skylark	82,902	33,450	40.0%
Stylus	377	20	5.3%
Summit	N/A	609	—
Sunbird	112,414	43,046	38.0%
Talon	N/A	1,431	—
Tercel	84,155	11,813	14.0%
Tracer	31,144	5,303	17.0%
323	33,833	2,506	7.4%
Total Subcompact	**1,858,012**	**376,446**	**20.2%**
COMPACT			
Acclaim	103,370[1]	35,784	34.6%
Aries	5,382[1]	681	12.6%
Beretta	102,583	9,139	9.0%
Calais	97,870	39,073	40.0%
Camaro	77,765	2,726	4.0%
Celica	70,329	7,339	10.4%
Corolla	162,977	52,548	32.2%
Corsica	159,815	66,037	41.0%
Daytona	37,025[1]	2,306	6.2%
Firebird	39,150	1,622	4.1%
Golf/GTI	17,446	1,744	10.0%
Grand Am	210,766	61,915	29.0%
Jetta	57,798	3,468	6.0%
Legacy	67,611	9,651	14.3%
Miata	42,535	2,306	5.4%
Mirage/4-door	36,443	13,675	37.5%
Probe	116,915	23,587	20.1%
Protege	45,375	2,875	6.3%
Reliant	6,435[1]	552	8.6%
Shadow	72,447[1]	26,588	36.7%
Spirit	87,386[1]	33,606	38.4%
Stanza	77,210	14,986	19.4%
Sundance	63,246[1]	19,668	31.0%
Tempo	219,852	85,571	38.9%
Topaz	74,617	19,675	26.3%
XT	1,454	100	6.9%
240SX	55,583	6,636	11.9%
Total Compact	**2,109,385**	**543,858**	**25.8%**
INTERMEDIATE			
Bonneville	68,794	16,050	23.0%
Camry	230,483	42,985	18.6%
Celebrity	35,786	16,146	45.0%
Century	118,019	31,293	27.0%
Cougar	77,766	9,523	12.2%
Cutlass Ciera	139,369	31,100	22.0%
Cutlass Supreme	102,906	25,759	25.0%
Dynasty	99,447[1]	50,296	50.5%
Galant	40,991	9,964	24.3%
Grand Prix	112,036	26,762	24.0%
LeBaron Sedan	27,037[1]	8,678	32.4%
Lumina	217,825	82,698	38.0%
Maxima	100,398	20,227	20.1%
Monte Carlo	58	5	9.0%
Pontiac 6000	48,260	19,882	41.0%
Regal	74,794	9,859	13.0%
Sable	92,333	30,450	32.9%
Sigma	1,566	204	13.0%
Taurus	306,166	130,101	42.5%
Thunderbird	100,978	21,275	21.1%
Volvo[2]	89,000[3]	4,450	5.0%
626/MX-6	109,494	6,027	5.5%
Total Intermediate	**2,193,506**	**593,734**	**27.0%**
STANDARD			
Caprice	147,677	53,570	36.0%
Crown Victoria	107,124	48,161	44.9%
Custom Cruiser SW	4,623	398	9.0%
Delta 88	101,482	12,455	12.0%
Grand Marquis	102,768	15,710	15.2%
LeBaron Coupe/ Convertible	62,993[1]	18,711	29.7%

1990-Model Year Registrations Fleet vs. Retail, *Continued*

MODEL	Retail Totals	Fleet Totals	% Fleet vs. Retail
LeSabre	145,593	15,734	11.0%
Maserati TC	4,377[1]	350	8.0%
Monaco	8,909[1]	2,575	28.9%
N.Y. Landau/Salon	42,104[1]	14,432	34.3%
N.Y. Fifth Avenue	37,104[1]	10,237	27.6%
Premier	N/A	2,620	—
Roadmaster	2	1	50.0%
Safari Station Wagon	773	31	4.0%
VW Passat Sedan/Wagon	15,538	1,476	9.5%
Total Standard	**781,067**	**196,461**	**25.1%**
LUXURY			
Allante	3,060	480	16.0%
Brougham/Chassis	34,619	3,551	10.0%
Cimarron	15	0	0.0%
Continental/Mark VII/ Town Car	220,742	78,023	35.3%
Corvette	22,234	2,324	10.0%
Cressida	13,468	1,183	8.8%
DeVille/Fleetwood	162,978	50,631	31.0%
Eldorado	24,304	3,623	15.0%
Imperial	10,985[1]	1,768	16.0%
Park Ave.	63,512	8,618	14.0%
Reatta	6,676	2,626	39.0%
Riviera	20,764	1,491	7.0%
RX-7	13,342	991	7.4%
Seville	31,879	19,218	60.0%
Supra	7,042	875	12.4%
Toronado	14,725	1,840	12.0%
98	51,158	9,615	19.0%
300ZX	23,721	5,630	23.7%
929	20,485	2,158	10.5%
Total Luxury	**745,709**	**194,645**	**26.1%**
Total Domestic	**5,518,576**	**1,601,875**	**29.0%**
Total Import	**2,169,103**	**303,269**	**14.0%**
Other Imports, etc. (not reported on chart)	**—**	**74,056** (est.)	**—**
Total Industry	**7,687,679**	**1,905,144**[4]	**24.7%**

Note: Import share of fleet is 15.9%
Domestic share of total fleet is 84.1%

[1] New car delivery figures, not registrations. [2] Includes all Volvo models.
[3] Sales figures, not registrations. [4] Does not include "Other Imports" total.

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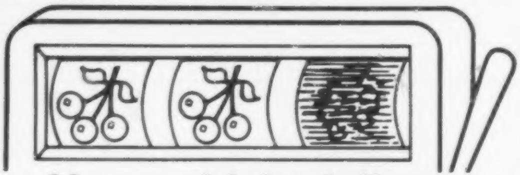

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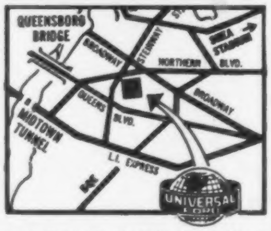

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LEASING & RENTAL: Past Growth & Projections

Units In Operation (1/1/91)

LEASED SEGMENT	1975		1980		1985		1990		1995 (est.)	
	Units	$ Rev.	Units	$ Rev.	Units	$ Rev.	Units	$ Rev.	Units	$ Rev.
	(000)	Millions	(000)	Millions	(000)	Millions	(000)	Millions	(000)	Millions
Business Fleets +25	1,666		1,968		2,150		2,161		2,250	
Business Fleets 10-24	174		266		308		399		448	
Other Fleet	46		93		186		377		455	
Retail or Individual	1,072		1,708		1,800		2,020		2,315	
Total Cars Fleet Leased	**2,958**	**$9,100**	**4,035**	**$18,900**	**4,444**	**$28,660**	**4,957**	**$34,150**	**5,468**	**$38,500**
Truck Leasing	735	$ 4,200	800	$ 7,300	878	$10,000	1,055	$15,190	1,190	$17,500
Total Vehicle Leasing	**3,693**	**$13,300**	**4,835**	**$26,200**	**5,322**	**$38,660**	**6,012**	**$49,340**	**6,658**	**$56,000**
RENTAL SEGMENT										
Car Rental	355	$ 1,400	500	$ 2,800	760	$ 4,600	1,008	$ 7,900	1,180	$ 9,440
Truck Rental (all G.V.W.s) -	160	$ 1,000	175	$ 2,300	200	$ 3,400	202	$ 3,750	222	$ 4,370
Total Vehicle Rental	**515**	**$2,400**	**675**	**$ 5,100**	**960**	**$ 8,000**	**1,210**	**$11,650**	**1,402**	**$13,810**

SOURCE: *Automotive Fleet* Research Dept.

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Tracking the Top 10 Fleet Lessors

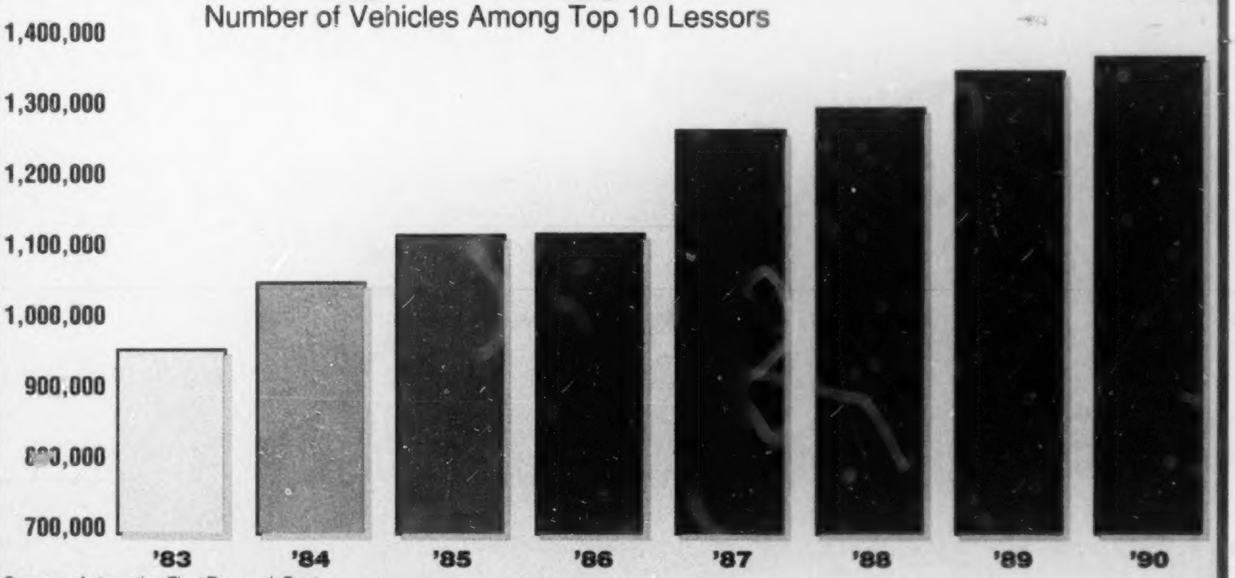
Total—U.S. Vehicles/Year

Lessor	1983	1984	1985	1986	1987	1988	1989	1990
GE Capital Fleet Services	—	—	—	—	420,000[1]	400,000	375,000	348,000
(Gelco)[2]	(235,000)	(267,000)	(268,000)	(270,000)	—	—	—	—
(D&K)[2]	(80,000)	(80,000)	(84,000)	(100,000)	—	—	—	—
(McCullagh)[3]	(75,000)	(80,000)	(80,000)	(80,000)	(80,000)	(80,000)	(75,000)	(75,000)
PHH FleetAmerica	200,000	200,000	225,000	275,000	290,000	313,000	326,500	325,000
(Avis Leasing)[4]	(44,500)	(44,500)	(48,000)					
ARI	50,000	65,000	65,000	70,000	75,000	75,000	148,500	148,500
(Lend Lease)[5]	42,500	50,000	60,000	58,000	85,000	91,000	—	—
Wheels	70,000	80,000	90,000	100,000	100,000	105,000	105,000	125,000
U.S. Fleet Leasing	45,000	50,000	50,000	50,000	68,000	75,000	85,000	85,000
(Hertz Leasing)[6]	(50,000)	(50,000)	(50,000)	—	—	—	—	—
Associates	13,000	22,000	24,000	27,000	41,600	45,800	53,000	67,000
LMV	7,500	13,000	24,000	33,000	38,000	45,300	47,000	51,000
Donlen Corp.	25,000	25,000	25,000	30,000	30,000	30,000	33,000	35,000
Enterprise Leasing	—	18,000	20,000	20,000	23,000	26,000	30,000	32,000
Lease Plan USA	—	—	—	—	—	—	—	30,000*
Top 10 Total	**937,500**	**1,044,500**	**1,113,000**	**1,113,000**	**1,250,600**	**1,286,100**	**1,278,000**	**1,321,500**

[1] GE Capital Fleet Services fleet total also includes Kerr Leasing, which was acquired in 1984.
[2] Purchased by GE Capital in 1987 [3] Purchased by GE Capital in 1990, its portfolio not included in GE's total.
[4] Purchased by PHH in 1986 [5] Lend Lease Purchased by Holman Enterprises (ARI) in 1989 [6] Purchased by USFL in 1986
*AF Estimate

The "Big" Get "Bigger"

Number of Vehicles Among Top 10 Lessors



Sources: *Automotive Fleet* Research Dept.

Leading Fleet Vehicle Lessors by U.S. Portfolio Size

(Includes lessor fleet managed units. Does not include rentals)

Rank	**Fleet Lessors**	**Number U.S. Cars**	**Number U.S. Trucks**	**Total U.S. Vehicles**
1.	GE Capital Fleet Sevices	182,500	165,500	348,000
	McCullagh	48,500	26,500	75,000[1]
2.	PHH FleetAmerica (including Avis Leasing Corp.)	205,000	120,000	325,000
3.	ARI	84,600	63,900	148,500
4.	Wheels	93,750	31,250	125,000
5.	U.S. Fleet Leasing	59,500	25,500	85,000
6.	Associates	39,000	28,000	67,000
7.	LMV	35,000	16,000	51,000
8.	Donlen	27,000	8,000	35,000
9.	Enterprise	29,500	2,500	32,000
10.	Lease Plan U.S.A.	25,000[2]	5,000[2]	30,000
11.	World Omni	24,500	5,000	29,500
12.	AT&T Automotive Services	6,500	13,000	19,500
13.	Fleetmark	2,200	17,300	19,500
14.	Sovran	14,000	4,800	18,800
15.	Emkay	15,000	3,500	18,500
16.	Mike Albert	15,800	2,200	18,000
17.	Leasing Associates/Allstate	12,500	2,000	14,500
18.	AMI Leasing Group	7,000	6,000	13,000
19.	Leaseway Puerto Rico	N/A	N/A	9,000
20.	Trans-National Leasing	3,750	4,250	8,000
	Totals	**930,600**	**550,200**	**1,489,800**

(Data supplied by individual lessors except where indicated)

Leading Fleet Vehicle Lessors by International Portfolio Size

Rank	**Fleet Lessors**	**Total International[3]**
1.	Lease Plan International	100,000
2.	PHH FleetAmerica	60,000
3.	GE Capital Fleet Services	27,000
4.	U.S. Fleet Leasing	18,000
5.	ARI	8,500
6.	Wheels	1,000
7.	Donlen	500
8.	Enterprise	500
9.	Fleetmark	250
10.	Emkay	225
	Total	**215,975**

[1] Not Included in GE Capital Fleet Sales Totals [2] AF Estimate [3] Including Canada, but not U.S.

TOP 30 Banks In Vehicle Leasing

Bank	Location	*Leases in Portfolio at End of		
		1990	1989	1988
1. Marine Midland Bank	Buffalo, NY	120,000	140,000	141,000
2. Wells Fargo Bank	Oakland, CA	65,300	57,300	48,500
3. Citicorp National Services, Inc.	St. Louis, MO	48,014	38,577	24,183
4. Chase Manhattan Bank/ Chase Automotive Finance	Manhasset, NY	45,149	28,500	17,223
5. First Fidelity Bank Leasing Group	Wayne, PA	40,231	42,587	43,265
6. First Interstate Bank of California	Cerritos, CA	39,530	43,294	43,591
7. Bank of Tokyo - U.B. Vehicle Leasing	Boston, MA	35,031	27,450	22,558
8. Security Pacific Corp.	Woodland Hills, CA	35,000	36,000	41,800
9. Banc One Acceptance	Columbus, OH	34,723	32,540	36,582
10. Continental Bank Corp.	Ft. Washington, PA	23,001	24,200	21,250
11. Huntington National Bank	Columbus, OH	21,446	21,285	20,997
12. First Pennsylvania Bank-Lease	Ft. Washington, PA	20,532	19,598	17,400
13. Union Bank-Stanchart Leasing	Orange, CA	19,500	19,229	19,800
14. Trust Company Bank	Atlanta, GA	16,000	19,714	22,500**
15. The Fifth Third Bancorp.	Cincinnati, OH	15,000	17,076	11,582
16. Society Lease, Inc.	Cleveland, OH	14,307	10,164	9,000
17. Sanwa Bank of California	Monterey Park, CA	10,919	9,432	7,419
18. Seafirst Bank	Seattle, WA	10,526	8,351	8,700
19. Bank of the West	Pacheco, CA	9,860	11,500	16,000
20. First Union National Bank	Charlotte, NC	7,970	8,000	10,389
21. National Bank of Detroit	Detroit, MI	7,507	10,900	14,575
22. Manufacturers National Bank of Detroit	Detroit, MI	7,387	9,129	11,300**
23. Perpetual Savings Bank	Baltimore, MD	7,250	5,122	2,276
24. Provident National Bank	Wilmington, DE	7,202	7,000	—
25. Valley National Bank	Phoenix, AZ	6,999	6,354	6,104
26. First National Bank of Atlanta	Atlanta, GA	6,925	7,778	7,943
27. Union National Bank	Pittsburgh, PA	5,499	5,379	4,521
28. National City Bank	Cleveland, OH	5,417	8,555	12,883
29. Star Bank Corp.	Cincinnati, OH	5,000	8,000	8,727
30. Citizens and Southern Leasing	Atlanta, GA	3,537	7,785	9,248

* Indicates total number of leases in each bank's portfolio at time of survey. Some banks listed may not be presently offering retail lease programs.

*** AF Estimate*

■ 1990 U.S. Daily Car Rental Market Profile

Rank	Company	Number U.S. Locations	Number U.S. Vehicles*	Market Share Percent	Estimated '90 Revenue (Millions)
On-Airport/NearAirport/Local Market Segment					
1.	Hertz	1,500	190,000	23.1%	$1,710
2.	Avis	1,400	150,000	18.2%	1,345
3.	Budget	1,200	130,000	15.8%	1,118
4.	National	1,000	110,000	13.4%	907
5.	Alamo	130	90,000	10.9%	675
6.	Dollar	325	40,000	4.9%	291
7.	Thrifty	350	40,000	4.9%	348
8.	Value	25	25,000	3.0%	171
9.	General	60	18,000	2.2%	190
10.	American Intl.	175	15,000	1.8%	175
11.	Other	25	15,000	1.8%	171
		6,190	823,000	100.0%	$7,101
Local/Replacement Market Segment					
1.	Enterprise	410	85,000	58.6%	$339
2.	Agency	525	32,000	22.0%	140
3.	Action	275	17,000	11.8%	76
4.	Snappy	260	11,000	7.6%	49
		1,470	145,000	100.0%	$654
U.S. Industry Totals		7,660	968,000		$7,755
Manufacturer/Dealer Rental			22,000		
Total Car Rental Market			990,000	100.0%	$7,755

Average Revenue/Car/Month

Business/Leisure	$719/Car/Mo.
Local/Replacement	$376/Car/Mo.

*Passenger cars, including licensees

Size and Model Cars Purchased By Major Leasing Companies 1990 vs. 1989

Luxury	Standard	Intermediate	Compact	Subcompact	Imports
Electra/Park Ave.	LeSabre	Regal	Skylark	Cavalier	All Models
Riviera/Reatta	Caprice	Century	Spirit	Colt	
Seville	LTD Crown Vic	Celebrity	Acclaim	Escort	
Fleetwood	Grand Marquis	LeBaron	Daytona	Mustang	
Brougham	Delta Eighty Eight	Cougar	Topaz	Sunbird	
Continental	Fifth Avenue	Cutlass Supreme	Calais		
Mark VII		Cutlass Ciera	Tempo		
Town Car		6000	Grand Am		
Olds98		Grand Prix	Firebird		
Toronado/Trofeo		Bonneville	Shadow		
Corvette		New Yorker	Shadow		
		Taurus	Sundance		
		Sable	Beretta		
		Premier	Corsica		
		Premier			
		Dynasty			
		Lumina			
		Salon			

Company	Year	Luxury	Standard	Intermediate	Compact	Subcompact	Imports
Associates	1990	5.0	13.1	61.7	16.2	1.1	2.9
	1989	4.9	17.0	62.2	11.1	2.1	2.7
Avis	1990	3.4	10.1	63.6	10.9	8.8	3.2
	1989	4.5	14.9	61.9	8.3	8.9	1.5
ARI	1990	4.0	14.0	65.0	8.0	7.0	2.0
	1989	5.2	12.8	62.0	12.0	6.0	2.0
Donlen	1990	3.4	12.3	72.0	6.4	2.9	3.0
	1989	2.9	11.6	71.0	9.4	3.7	1.4
Enterprise	1990	7.3	17.5	51.4	9.7	2.8	11.3
	1989	6.1	9.6	70.7	7.1	2.7	3.8
GE Capital Fleet Services	1990	1.1	9.7	76.3	6.0	3.1	3.8
	1989	1.5	11.7	62.3	16.4	5.9	2.2
Lease Plan U.S.A.	1990	2.1	6.7	66.3	17.4	4.7	2.8
	1989	1.1	5.2	71.2	16.4	2.8	3.3
LMV	1990	2.0	10.4	65.2	10.3	5.4	6.7
	1989	1.9	10.6	65.0	10.4	5.5	6.6
McCullagh	1990	2.0	34.0	47.0	14.0	2.0	1.0
	1989	2.7	24.9	57.1	7.5	4.9	2.9
PHH Fleet America	1990	1.7	4.9	68.1	20.8	2.3	2.2
	1989	2.3	7.7	65.9	17.4	4.7	2.0
U.S. Fleet Leasing	1990	5.2	11.9	65.8	8.4	4.2	4.5
	1989	4.0	11.5	61.0	18.0	1.0	4.5
Wheels	1990	1.4	9.3	74.9	6.0	6.0	2.4
	1989	1.8	10.2	72.1	8.6	5.1	2.2

1990 Fleet Car Costs by Region

1 NewEngland 2 MidEast 3 GreatLakes 4 Southeast 5 Plains 6 Southwest 7 RockyMount. 8 FarWest

1= New England
7=Rocky Mountain
5=Plains
3=Great Lakes
2=Mid East
8=Far West
6=Southwest
4=Southeast

Regional Code	Running Expenses cents/mile	Standing Expenses $ per month
1	7.05	375.09
2	7.51	364.39
3	6.77	351.24
4	6.99	341.15
5	6.50	353.20
6	7.23	335.39
7	7.23	337.51
8	7.69	341.48
USA	6.98	345.66

Running expenses include gasoline, oil, tires, and maintenance. Standing expenses are incurred whether or not the car is used, and include such fixed costs as insurance and license fees.

Source: PHH FleetAmerica

NAFA Personal-Use Data

(1) How Employees Are Charged for the Personal Use of a Fleet Vehicle

1 = Per mile charge. 2 = Flat weekly charge.
3 = Flat monthly charge. 4 = Combination per mile/flat charge.
5 = Graduated scale. 6 = Other.

	1	2	3	4	5	6
U.S. Commercial Fleets	37%	8%	32%	16%	0%	7%
U.S. Government Fleets	27%	59%	7%	0%	0%	7%
U.S. Public Utilities Fleets	47%	18%	0%	29%	0%	6%

Average Amount Employees Are Charged Per Mile for the Personal Use of a Fleet Vehicle

	1985	1986	1987	1988	1989
Industry Average	14.6¢	16.7¢	17.5¢	16.8¢	18.6¢

(2) Reimbursement For Use of Personal Car Mileage Only (Assigned Fleet Car Not in Service) For U.S.Commercial Fleets

	1986	1987	1988	1989
	Industry average	Industry average	Industry average	Industry average
Amount	20.7¢	21.4¢	22.4¢	24.3¢

NAFA Used-Car Data

Number of Model Year Cars Sold

	1990 All U.S. Fleets
U.S. Commercial Fleets	
1987 Model Year	3,751
1988 Model Year	2,717
1989 Model Year	1,405
U.S. Government Fleets	
1987 Model Year	1,263
1988 Model Year	1,841
1989 Model Year	18
U.S. Public Utilities Fleets	
1987 Model Year	259
1988 Model Year	403
1989 Model Year	12

Average Age of Vehicles Sold

Months	
Autos	40.0
Vans	56.0
Lt. Duty Trucks	68.0
Miles	
Autos	73,980
Vans	73,120
Lt. Duty Trucks	72,483

Selling Methods
Number of Cars Sold in Each Category

	1988	1989
U.S. Commercial Fleets		
Wholesale/Auto Auction	10,889	7,147
Employee	5,614	3,047
Used Car Dealer	515	196
New Car Dealer (Trade-In)	1,172	252
U.S. Government Fleets		
Wholesale/Auto Auction	1,570	4,204
Employee	8	380
Used Car Dealer	0	20
New Car Dealer (Trade-In)	5	101
U.S. Public Utilities Fleets		
Wholesale/Auto Auction	1,612	878
Employee	242	551
Used Car Dealer	137	1
New Car Dealer (Trade-In)	12	0

Top 10 Cable TV Fleets

a bobit publication

june 1991

automotive FLEET®

SPECIAL REPORT

Vehicle Selection & Purchasing Management

- Cost-Effective Selectors
- Why Safety is Hot
- Cycling for Profit
- Electronic Ordering

Pickup Bed Options

Fleet Dealer Awards

1992 Econoline Van/Club Wagon

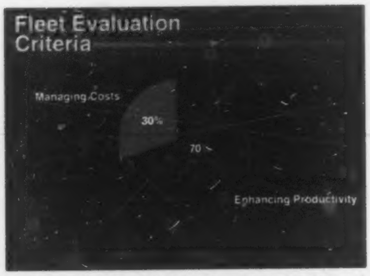
automotive FLEET®

BOBIT PUBLISHING

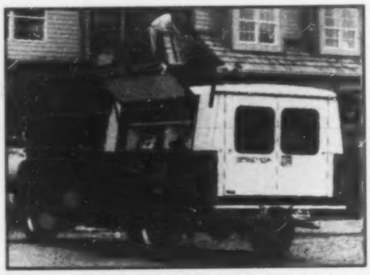
June 1991
VOL. 30, NO. 8

Influencing the management of 5,072,000 cars and 2,209,000 light trucks and vans in business, leasing, rental, utility, government, police, and taxi fleets.

CAR AND LIGHT TRUCK FLEET AND LEASING MANAGEMENT MAGAZINE



p. 23 —A recent industry survey found that 70 percent of the responding fleet managers see their job primarily as one of determining the right vehicles for their fleet application to enhance driver productivity.



p. 68—Service shells, tool boxes, storage units, and ladder racks are among the choices available for equipping light-duty pickups.

On the Cover—Ford Division's Bill Willis (left), general fleet manager, and Bob Blank, fleet sales manager, pose next to a 1992 Ford Club Wagon. For details on the 1992 Econoline Van/Club Wagon's new features, see page 62.

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Cable TV Fleet Channels Energy into Maintenance and Safety

Cox Cable of San Diego makes fleet maintenance and driver training top priorities in order to provide uninterrupted cable television signals to its subscribers. Also presented is a listing of the nation's 10 largest cable TV fleets.

This Chevrolet S-10 pickup operated by Cox's San Diego fleet is equipped for carrying cable TV counters, cable, and climbing equipment.

A significant percentage of most cable company fleets are made up of specially-modified trucks carrying installation and repair equipment necessary to establish and maintain uninterrupted cable TV signal transmission.

Cox Cable of San Diego, CA uses approximately 50 such vehicles in its regional operation and operates a centralized regional maintenance program to keep these vehicles running. (Cox Cable of San Diego is a regional operation that is part of Cox Enterprises in Atlanta, GA, one of the top 10 cable fleets in the nation. See page 66.)

Atypical Usage is the Norm

Although most vehicles in the Cox Cable of San Diego fleet average approximately 12,000 miles per year, the installation and repair trucks log at least 20,000 miles per year. The miles that are put onto these vehicles are atypical in terms of normal driving, due to the special nature of their business. "These trucks are used for putting in lines, checking signals, and also for 'tuning up' the cable system, which is something we do on a daily basis," says Skip Dye, who administers the San Diego fleet. "Typically, these vehicles go through a lot of short distance, stop-and-go driving in the course of their day. The vehicles are driven to a location, the driver sets up his or her equipment, performs the job, and then moves to the next location, which can be no more than a quarter-mile down the road. Each driver may perform such an operation as many as 40 times per day."

Dye says that the way trucks are spec'ed goes a long way in making sure that they can withstand this type of unusual usage. "The company tries to spec as many heavy-duty components as we can on the trucks in the 10,000 to 15,000 GVW range," Dye explains. "By upgrading our spec's, we also hope to extend our replacement cycles up to 60 months from an average of 42 months. We believe that by going with the heavier-duty components we can get through that length of time without serious problems."

Dye says that the company is equipping both gasoline and diesel engines in these vehicles, but that the diesels seem to be better suited to Cox's operations. But there are also drawbacks to the diesels that have to be dealt with.

"A lot of our cable maintenance and tune-up operations take place between 11 p.m. and 6 a.m., and the diesels are a little noisy. We sometimes get complaints about them, and so from a customer service standpoint we want to minimize that," Dye explains. "We are still trying to balance the noise problem with the wear-and-tear on the motors of our vehicles."

Frequent Inspections Reduce Costs

"All of Cox's regional companies use their own centralized maintenance program, and we are lucky to have our vehicles all under one roof," says Dye. "We provide all our own service and maintenance, except for paint and body work, which helps out a great deal in keeping our vehicles running. With all vehicles in one place, we can inspect approximately one-third of the fleet each day."

Included at the San Diego maintenance facility is a fuel island fed by two 15,000-gallon tanks. Before the start of each workday, a fleet attendant fuels each vehicle, performs a walk-around safety check, a lubricant and fluid check, and tests each vehicle for road-worthiness. "This inspection determines if there are any impending problems," says Dye. "This allows us to catch minor problems before they become major ones."

Accidents Reduced by Training

Making drivers aware of safety and vehicle responsibilities is another aspect of Cox's operations that keeps the fleet running smoothly. Installation and repair drivers receive three hours of individual training on the particular vehicle they will operate, in addition to a four-hour driver safety and training program employees go through when hired. "The safety and vehicle training really pays off in lower accident rates and maintenance," says Dye. "The message we try to get across is to keep driving speed down, use safety belts, and walk around the vehicle before moving it to make sure there is nothing near it they could accidentally run over or hit."

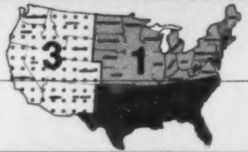
Cox employs a safety manager to administer the training, and Dye is confident that the training can meet any Occupational Safety and Health Administration requirements that may be mandated. AF

Top 10 Cable Television Fleets

'91 RANK	COMPANY NAME & HEADQUARTERS	FLEET CONTACT	CO. OWNED	LESSORS	#CARS	#TRUCKS & VANS	TOTAL
1	Tele-Communications, Inc. Denver, CO	Lynn Langfield	X	GEC Fleet	371	6,192	6,563
2	United Artists Ent. Co. Denver, CO	Fran Spencer	X	—	150	2,650	2,800
3	Cox Cable Communications Atlanta, GA	Patsy Brownson	X	ARI, Wheels	416	2,113	2,529
4	Jones Spacelink Ltd. Englewood, CO	Margaret Bryant	X	GEC Fleet, PHH	234	1,500	1,734
5	Storer Cable Communications Miami, FL	Shellie Davidson	X	—	76	1,432	1,508
6	Comcast Cable Communications Philadelphia, PA	Rich Pulley	X	—	100	1,400	1,500
7	Times-Mirror Cable TV Irvine, CA	Debi Harms	—	Wheels	0	1,300	1,300
8	Warner Cable Communications, Inc. Dublin, OH	Rick Cirincione	—	Wheels	12	1,200	1,212
9	Cablevision Industries Liberty, NY	Bill Cidney	X	—	250	950	1,200
10	Sammons Communications Corp. Dallas, TX	Bruce Crawford	X	—	30	710	740
Source: Automotive Fleet Research Dept.				**SUBTOTAL**	1,639	19,447	
				TOTAL VEHICLES			21,086

USED-CAR PRICES

The following are average used-car prices for the period ending May 1,1991. Prices are based on wholesale activity at major dealers across the country. They are divided into three zones as indicated on the accompanying map. These averages are calculated electronically. They are based on clean cars only. Proper allowance should be made for upgrading sharp cars and proper deduction taken for fair cars. Automatic transmissions have been included in the averages of all models. This information is published in *Automotive Fleet* by special permission of *Automotive Market Report.*



	AVERAGE AUCTION PRICE		
Model	**Zone 1**	**Zone 2**	**Zone 3**
89 BUICK SKYHAWK			
Coupe	5,601	5,655	5,485
Sedan	5,677	5,735	5,564
88 BUICK SKYHAWK			
Coupe	4,581	4,629	4,489
Sedan	4,645	4,691	4,554
90 BUICK SKYLARK			
Cust Sedan	7,748	7,824	7,594
89 BUICK SKYLARK			
Cust Sedan	6,536	6,603	6,408
90 BUICK CENTURY			
Cust Sedan	8,419	8,503	8,249
89 BUICK CENTURY			
Cust Sedan	6,639	6,705	6,506
90 BUICK LESABRE			
Cust Sedan	10,851	10,961	10,636
89 BUICK LESABRE			
Cust Sedan	8,512	8,597	8,340
90 CADILLAC DEVILLE			
Coupe	17,250	17,423	16,907
Sedan	17,426	17,600	17,077
89 CADILLAC DEVILLE			
Coupe	14,617	14,763	14,326
Sedan	14,777	14,927	14,482
90 CADILLAC SEVILLE			
Sedan	17,940	18,119	17,580
89 CADILLAC SEVILLE			
Sedan	14,850	15,000	14,553
90 CHEVY BERETTA			
Coupe	7,784	7,862	7,628
89 CHEVY BERETTA			
Coupe	6,457	6,524	6,329
90 CHEVY CORSICA			
Hatchback 5 Dr	7,562	7,640	7,413
89 CHEVY CORSICA			
Hatchback 4 Dr	6,122	6,184	6,000
90 CHEVY CAVALIER			
Sedan	5,880	5,938	5,763
89 CHEVY CAVALIER			
Sedan	5,193	5,244	5,089
89 CHEVY CELEBRITY			
Sedan	6,000	6,060	5,879
88 CHEVY CELEBRITY			
Sedan	4,755	4,803	4,661
90 CHEVY CAPRICE			
Sedan	8,622	8,709	8,451
89 CHEVY CAPRICE			
Sedan	6,792	6,861	6,656
90 CHRYSLER LEBARON			
Sedan	9,603	9,698	9,412
90 CHRYSLER LEBARON			
Highline Sedan	6,347	6,409	6,217
90 CHRYSLER NEW YORKER			
Salon Sedan	11,345	11,459	11,119
89 CHRYSLER NEW YORKER			
Sedan	9,709	9,803	9,514
89 CHRYSLER FIFTH AVENUE			
Sedan	9,762	9,854	9,563
88 CHRYSLER FIFTH AVENUE			
Sedan	7,773	7,851	7,618
89 DODGE ARIES AMERICA			
Sedan	4,825	4,872	4,726
88 DODGE ARIES AMERICA			
Sedan	3,752	3,789	3,676
90 DODGE SHADOW			
Liftbk 5 Dr	6,450	6,516	6,323
89 DODGE SHADOW			
Liftbk 5 Dr	5,262	5,312	5,158
90 DODGE DYNASTY			
Sedan	8,922	9,013	8,745
90 FORD ESCORT			
Htchbk 4 Dr LX	5,626	5,683	5,513
89 FORD ESCORT			
Htchbk 4 Dr LX	4,484	4,528	4,394
90 FORD MUSTANG			
LX-4 Coupe	7,433	7,509	7,287
89 FORD MUSTANG			
LX-4 Coupe	6,004	6,063	5,884
90 FORD TEMPO			
GL Sedan 4 Dr	6,714	6,781	6,579
89 FORD TEMPO			
GL Sedan 4 Dr	5,350	5,404	5,243
90 FORD TAURUS			
GL Sedan 4 Dr	9,269	9,362	9,085
89 FORD TAURUS			
GL Sedan 4 Dr	6,956	7,026	6,813
90 FORD CROWN VICTORIA			
Sedan	11,075	11,187	10,853
89 FORD CROWN VICTORIA			
Sedan	8,985	9,074	8,806
90 THUNDERBIRD			
Coupe	9,805	9,904	9,610
89 THUNDERBIRD			
Coupe	8,620	8,341	8,094
90 LINCOLN			
Town Car Sedan	17,786	17,963	17,432
Mark VII LSC Coupe	17,317	17,490	16,970
Continental Sedan	16,413	16 577	16,084
89 LINCOLN			
Town Car Sedan	13,309	13,444	13,043
Mark VII LSC Coupe	14,445	14,591	14,158
Continental Sedan	14,378	14,522	14,091
90 MAZDA 626			
LX Sedan 4 Dr	10,332	10,435	10,229
90 MERCURY COUGAR			
LS Coupe	10,306	10,408	10,096
89 MERCURY COUGAR			
LS Coupe	8,729	8,816	8,554
90 MERCURY TOPAZ			
GS Sedan 4 Dr	6,877	6,948	6,743
89 MERCURY TOPAZ			
GS Sedan 4 Dr	5,494	5,549	5,384
90 MERCURY SABLE			
GS Sedan 4 Dr	9,358	9,451	9,171
89 MERCURY SABLE			
GS Sedan 4Dr	7,010	7,079	6,868
90 MERCURY GRAND MARQUIS			
GS Sedan	11,557	11,672	11,327
89 MERCURY GRAND MARQUIS			
GS Sedan	9,524	9,619	9,334
90 MITSUBISHI MIRAGE			
Sedan 4 Dr	6,222	6,284	6,159
89 MITSUBISHI MIRAGE			
Sedan 4Dr	4,772	4,820	4,725
90 NISSAN SENTRA			
Sedan 2 Dr	5,560	5,615	5,503
90 NISSAN STANZA			
XE Ntch 4 Dr	9,310	9,402	9,217
90 NISSAN MAXIMA			
SE Sedan	14,666	14,813	14,518
89 NISSAN SENTRA			
Sedan 2 Dr	4,261	4,303	4,218
89 NISSAN STANZA			
Ntch 4 Dr	7,236	7,308	7,163
89 NISSAN MAXIMA			
SE Sedan	12,241	12,363	12,118
90 OLDS CIERA			
Coupe	8,485	8,571	8,316
Sedan	8,127	8,210	7,966
89 OLDS CIERA			
Coupe	6,565	6,632	6,433
Sedan	6,639	6,705	6,506
90 OLDS CALAIS			
Sedan	6,887	6,955	6,750
89 OLDS CALAIS			
Sedan	5,992	6,052	5,873
90 OLDS CUTLASS SUPREME			
Coupe	9,286	9,379	9,101
89 OLDS CUTLASS SUPREME			
Coupe	7,449	7,524	7,300
90 OLDS 98 REGENCY			
Sedan	13,652	13,791	13,380
89 OLDS 98 REGENCY			
Sedan	10,534	10,640	10,321
89 PLYMOUTH RELIANT			
Sedan	4,800	4,849	4,705
88 PLYMOUTH RELIANT			
Sedan	3,752	3,788	3,678
90 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	6,450	6,516	6,323
89 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	5,262	5,312	5,158
89 PLYMOUTH GRAN FURY			
Salon Sedan	4,928	4,979	4,830
88 PLYMOUTH GRAN FURY			
Salon Sedan	3,924	3,963	3,847
90 ACCLAIM			
Sedan	7,315	7,388	7,169
90 PONTIAC SUNBIRD			
LE Sedan	6,640	6,705	6,504
SE Coupe	6,550	6,614	6,418
89 PONTIAC SUNBIRD			
LE Sedan	5,503	5,558	5,392
SE Coupe	5,429	5,483	5,321
90 PONTIAC 6000			
LE Sedan	8,477	8,563	8,305
89 PONTIAC 6000			
LE Sedan	6,243	6,303	6,117
90 PONTIAC GRAND AM			
LE Sedan	7,749	7,828	7,595
89 PONTIAC GRAND AM			
LE Sedan	6,459	6,523	6,330
90 PONTIAC BONNEVILLE			
LE Sedan	10,986	11,097	10,766
89 PONTIAC BONNEVILLE			
LE Sedan	8,390	8,472	8,222
90 PONTIAC GRAND PRIX			
Coupe	9,583	9,678	9,390
89 PONTIAC GRAND PRIX			
Coupe	7,637	7,715	7,484
90 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	7,198	7,270	7,125
90 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	9,261	9,354	9,168
90 TOYOTA CRESSIDA			
Lux Sedan	15,505	15,660	15,350
89 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	6,331	6,393	6,268
89 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	7,711	7,788	7,635
89 TOYOTA CRESSIDA			
Lux Sedan	12,898	13,028	12,769
90 VOLKSWAGEN JETTA			
Sedan 4 Dr	8,374	8,458	8,289
89 VOLKSWAGEN JETTA			
Sedan 4 Dr	7,030	7,101	6,959
90 VOLVO			
240 DL Sedan	12,350	12,472	12,226
89 VOLVO			
240 DL Sedan	11,017	11,126	10,907

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visually deter thieves. Both items are portable from car to car. *Carbrella.*

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3 Days-2 Nights • Tour: ITSR1-MTL2
1. A deluxe room for 3 days, 2 nights
2. A welcome cocktail in the famous Carousel Lounge, or Aft-Deck Bar
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City	Full-Serve	Self-Serve
Little Rock, AR	148.5¢	115.4¢
Flagstaff, AZ	177.4	121.4
Sacramento, CA	158.6	111.7
New Haven, CT	138.7	131.9
Key West, FL	147.9	121.4
Augusta, GA	139.9	104.9
Des Moines, IA	159.4	125.9
Wichita, KS	149.6	111.9
Kalamazoo, MI	165.9	121.4
Gulfport, MS	147.2	116.9
Bismarck, ND	149.9	127.9
Santa Fe, NM	143.6	118.7
Niagara Falls, NY	130.9	119.4
Tulsa, OK	146.2	112.9
Beaumont, TX	119.9	113.4

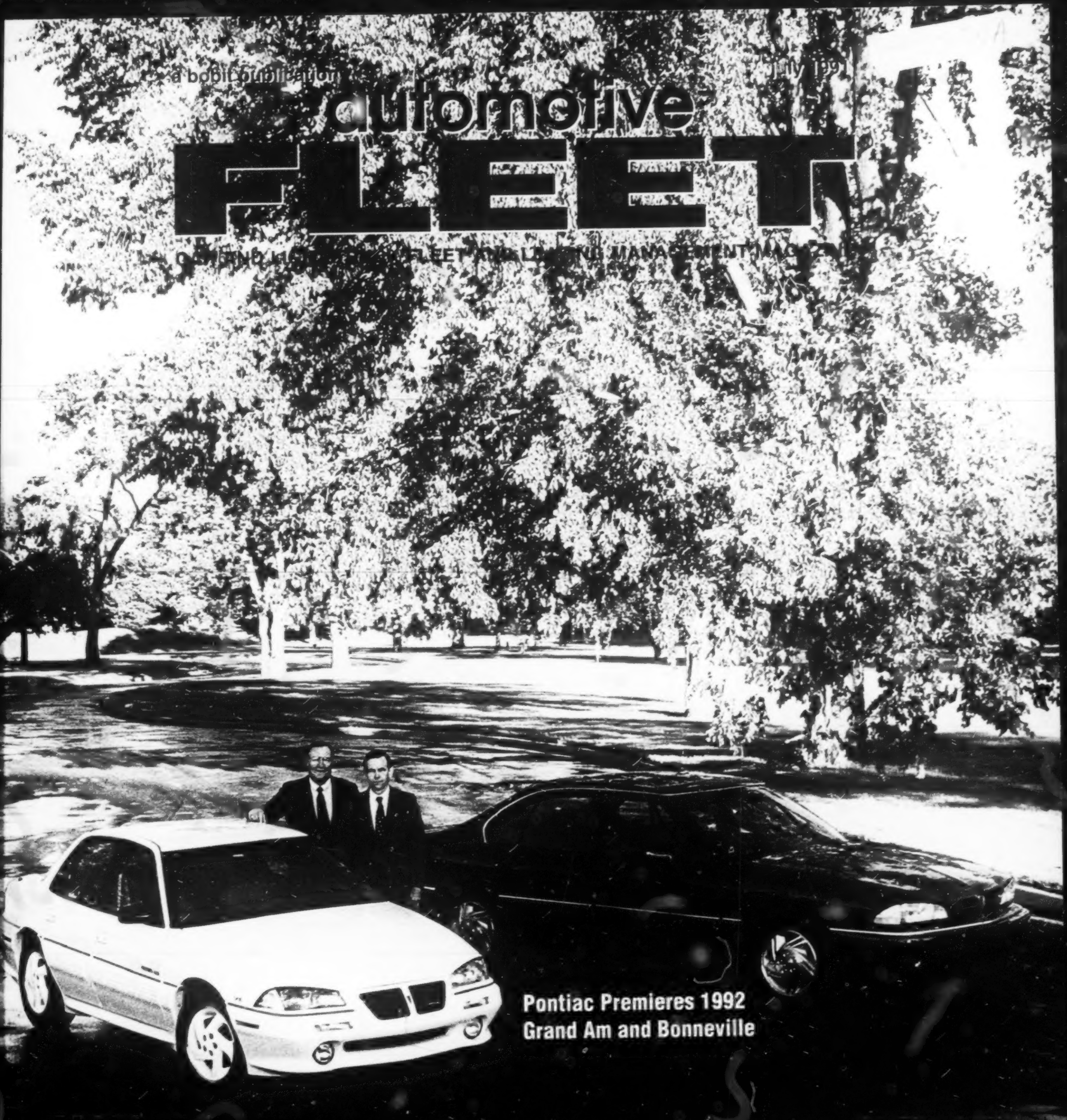
The average U.S. full-serve gasoline price for the month of May was 138.0 cents per gallon.
The average U.S. self-serve gasoline price for the month of May was 116.4 cents per gallon.
Survey conducted during the first five working days of May 1991.
Supplied by Runzheimer International, Runzheimer Park, Rochester, WI.

a bobit publication

July 1991

automotive FLEET

C[illegible] FLEET AND LEASING MANAGEMENT MAGAZINE



Pontiac Premieres 1992
Grand Am and Bonneville

First '92 Programs

Treasury Department Depreciation Study

Small Fleet Operating Solutions

Dualing Lessors: Pro and Con

Retail Incentives Restrict Fleet Buys

Spotlighting Service Bodies

automotive
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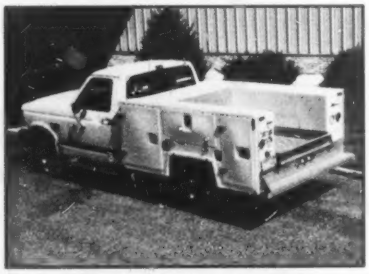
BOBIT PUBLISHING

July 1991
VOL. 30, NO. 9

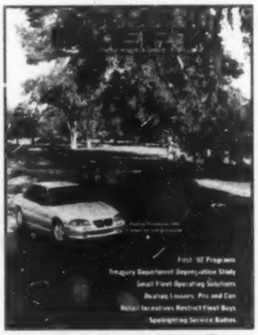
Influencing the management of
5,072,000 cars and 2,209,000 light trucks
and vans in business, leasing, rental,
utility, government, police, and taxi fleets.

WACKER
CONSTRUCTION EQUIPMENT
WACKER

P. 24 — Office Manager Jim Michels of the Wacker Corp. manages the company's 84-unit fleet in addition to various other responsibilities at the construction equipment company.



P. 72 — Service bodies are widely used in fleets for maintenance and service applications, because of the many ways they can be customized to fit specific needs.



On the Cover — The Pontiac Bonneville and Grand Am are new for 1992, and the Bonneville features GM's first-ever passenger air bag. The August issue of AF will present a sneak preview of these and other new models.

Features

24 **Small Fleets Speak Out on Challenges Confronting Them**
Managers of fleets with less than 100 vehicles often face special problems because fleet administration is not their only job responsibility.

30 **1992-Model Year Fleet Incentive Programs**
Buick, Chevrolet, GMC, Oldsmobile, Pontiac, and Volkswagen all have announced their 1992-model year fleet programs.

34 **Debating the Pros and Cons of Using Multiple Lessors**
Members of the leasing and fleet management professions give their views on when to use more than one lessor, and why fleets may want to consider it.

44 **Color Choice Can Enhance Resale**
Current research on the popular vehicle colors of the future can help fleet managers maximize return on remarketed vehicles.

46 **Will Treasury's Depreciation Study Lead to Tax Revision?**
The Treasury Department is recommending that the class-life for business-use vehicles be extended from three to three and a half years.

48 **Restrictive Retail Incentives Impact Fleets' Buying Power**
One fleet discovered that its employees could buy a personal car cheaper through retail rebates than the company could using fleet incentives.

51 **What Can Dealerships Offer Fleets?**
The key to mutual survival among dealers, lessors, and fleet managers in the '90s is a partnership between these groups.

56 **The City of Burbank: A Tale of Two Fleets**
The city's fleet is divided into two distinct groups, a 325-unit public services fleet, and a 675-unit general city fleet.

64 **Auto Industry Voices Concern over Proposed CAFE Hike**
New corporate average fuel economy requirements proposed by Sen. Richard Bryan (D-NV) have auto manufacturers up in arms.

68 **Automotive Fleet 1991 Fact Book Update**
A handy reference on Fact Book changes and additions.

70 **High-Tech Systems Automate Fleet Operations**
We examine ways that leading-edge technologies are used in the fleet industry.

Truck/Van Section

72 **Pickup Service Bodies Live Up to Fleets' Expectations**
Service bodies are particularly useful for utility, telephone, and oil companies because of their capacity to haul supplies and their accessibility to tools.

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Automotive Fleet
1991 Fact Book Update

Presented below are updates and corrections to information recently published in the 1991 Automotive Fleet *Fact Book. Please save this page for future reference when using the 1991 edition of the Fact Book.*

Manufacturers Section

The phone number for J.M. Hahn, manager, fleet programs for General Motors Corp. was incorrectly listed on page 58. Hahn's correct phone number is (313) 974-6387.

On page 66, Joseph Zeuli, former manager, fleet operations for Mitsubishi Motor Sales, has since been promoted to manager of dealer facilities. Christopher White, manager, fleet sales, now heads Mitsubishi's fleet department.

The phone number for Mike Rocco, Toyota's corporate fleet manager, was incorrectly listed on page 82. Rocco's correct phone number is (213) 618-4936.

Fleet Lessor Section

On page 118, the description of the lessor and management services offered by PHH FleetAmerica should read: "Car and truck management, vehicle leasing, vehicle expense reporting, automotive services, maintenance assistance, and accident management services."

Trucks — Class I, II, III, IV, V

Type of Fleet	Leased or Managed	Owned	Total
Businesses with 25 or More Class I-V Trucks (Includes leasing, construction, plumbing, heating, food distribution, pest control, cable TV, etc.)	686,000	255,000	941,000
Businesses with 10 to 24 Class I-V Trucks	191,000	82,000	273,000
Utilities	105,000	488,000	**593,000**
Government (Federal, state, county, and local.)	59,000	187,000	246,000
Daily Rental	13,000	138,000	151,000
Other (Police, taxi, etc.)	1,200	4,800	6,000
TOTAL	1,055,200	**1,154,800**	**2,210,000**

ARI, Inc.'s fax number was incorrectly listed on page 92. The correct fax number is (609) 234-9[illegible]45.

On page 104, Daniel F. Starr was listed as vice president, sales, Western region for Emkay Inc. Starr is no longer with the company.

Enterprise Leasing Co.'s address was incorrectly listed on page 106. The correct address is 8850 Ladue Road, St. Louis, MO 63124.

On page 114, LMV Leasing, Inc's fax number was incorrectly listed. The correct fax number is (412) 828-0314.

Fleet Dealer Section

On page 165, Jim Conner's name was incorrectly spelled. Also, the dealership was incorrectly listed as Connors Fleet. The correct name for the dealership is Schmerler Ford. Conner is also fleet manager for the dealership's Buick, Chevrolet, and Lincoln-Mercury franchises.

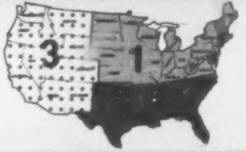
On page 160, Meri Huskey was incorrectly identified as the fleet manager for Penske Buick. Huskey's dealership is Penske Cadillac.

Market Data Section

On page nine, the Class 1-5 truck portion of the chart entitled Fleet Statistics by Type and Size (as of 1/1/91) was incorrectly printed. Presented is an updated version of this chart with the correct fleet figures highlighted in boldface type.

USED-CAR PRICES

The following are average used-car prices for the period ending June 10,1991. Prices are based on wholesale activity at major dealers across the country. They are divided into three zones as indicated on the accompanying map. These averages are calculated electronically. They are based on clean cars only. Proper allowance should be made for upgrading sharp cars and proper deduction taken for fair cars. Automatic transmissions have been included in the averages of all models. This information is published in *Automotive Fleet* by special permission of *Automotive Market Report.*



	AVERAGE AUCTION PRICE		
Model	**Zone 1**	**Zone 2**	**Zone 3**
89 BUICK SKYHAWK			
Coupe	5,618	5,672	5,501
Sedan	5,694	5,752	5,581
88 BUICK SKYHAWK			
Coupe	4,595	4,643	4,502
Sedan	4,659	4,705	4,568
90 BUICK SKYLARK			
Cust Sedan	7,787	7,863	7,632
89 BUICK SKYLARK			
Cust Sedan	6,569	6,636	6,440
90 BUICK CENTURY			
Cust Sedan	8,419	8,503	8,249
89 BUICK CENTURY			
Cust Sedan	6,619	6,685	6,486
90 BUICK LESABRE			
Cust Sedan	10,829	10,939	10,615
89 BUICK LESABRE			
Cust Sedan	8,486	8,571	8,315
90 CADILLAC DEVILLE			
Coupe	17,423	17,597	17,076
Sedan	17,600	17,776	17,248
89 CADILLAC DEVILLE			
Coupe	14,573	14,719	14,283
Sedan	14,733	14,882	14,439
90 CADILLAC SEVILLE			
Sedan	18,119	18,300	17,756
89 CADILLAC SEVILLE			
Sedan	14,895	15,045	14,597
90 CHEVY BERETTA			
Coupe	7,838	7,917	7,681
89 CHEVY BERETTA			
Coupe	[illegible]	6,589	6,392
90 CHEVY CORSICA			
Hatchback 5 Dr.	7,600	7,678	7,450
89 CHEVY CORSICA			
Hatchback 4 Dr	6,008	6,067	5,891
90 CHEVY CAVALIER			
Sedan	5,898	5,956	5,780
89 CHEVY CAVALIER			
Sedan	5,209	5,260	5,104
89 CHEVY CELEBRITY			
Sedan	6,018	6,078	5,897
88 CHEVY CELEBRITY			
Sedan	4,741	4,789	4,647
90 CHEVY CAPRICE			
Sedan	8,605	8,692	8,434
89 CHEVY CAPRICE			
Sedan	6,756	6,827	6,623
90 CHRYSLER LEBARON			
Sedan	9,555	9,650	9,365
89 CHRYSLER LEBARON			
Highline Sedan	6,366	6,428	6,236
90 CHRYSLER NEW YORKER			
Salon Sedan	11,345	11,459	11,119
89 CHRYSLER NEW YORKER			
Sedan	9,660	9,754	9,466
89 CHRYSLER FIFTH AVENUE			
[illegible]	9,762	9,854	9,563
88 CHRYSLER FIFTH AVENUE			
Sedan	7,719	7,796	7,565
89 DODGE ARIES AMERICA			
Sedan	4,811	4,857	4,712
88 DODGE ARIES AMERICA			
Sedan	3,733	3,770	3,658
90 DODGE SHADOW			
Liftbk 5 Dr	6,431	6,496	[illegible]
89 DODGE SHADOW			
Liftbk 5 Dr	5,288	5,339	5,184
90 DODGE DYNASTY			
Sedan	9,459	9,550	9,271
90 FORD ESCORT			
Htchbk 4 Dr LX	5,637	5,694	5,524
89 FORD ESCORT			
Htchbk 4 Dr LX	4,506	4,551	4,416
90 FORD MUSTANG			
LX-4 Coupe	7,433	7,509	7,287
89 FORD MUSTANG			
LX-4 Coupe	6,016	6,075	5,896
90 FORD TEMPO			
GL Sedan 4 Dr	6,748	6,815	6,612
89 FORD TEMPO			
GL Sedan 4 Dr	5,361	5,415	5,253
90 [illegible] TAURUS			
GL Sedan [illegible]	9,241	9,334	9,058
89 FORD TAURUS			
GL Sedan 4 Dr	6,977	7,047	6,833
90 FORD CROWN VICTORIA			
Sedan	11,760	11,878	11,527
89 FORD CROWN VICTORIA			
Sedan	9,567	9,663	9,378
90 THUNDERBIRD			
Coupe	9,776	9,874	9,581
89 THUNDERBIRD			
Coupe	8,235	8,316	8,070
90 LINCOLN			
Town Car [illegible]	17,694	18,143	17,606
Mark VII [illegible] Coupe	17,490	17,665	17,140
Continental Sedan	16,577	16,743	16,245
89 LINCOLN			
Town Car Sedan	13,269	13,404	13,004
Mark VII LSC Coupe	14,402	14,547	14,116
Continental Sedan	14,335	14,478	14,049
90 MAZDA 626			
LX Sedan 4 Dr	10,332	10,435	10,229
90 MERCURY COUGAR			
LS Coupe	10,337	10,439	10,126
89 MERCURY COUGAR			
LS Coupe	8,755	8,842	8,580
90 MERCURY TOPAZ			
GS Sedan 4 Dr	6,911	6,983	6,777
89 MERCURY TOPAZ			
GS Sedan 4 Dr	5,505	5,560	5,395
90 MERCURY SABLE			
GS Sedan 4 Dr	9,330	9,423	9,143
89 MERCURY SABLE			
GS Sedan 4 Dr	7,031	7,100	6,889
90 MERCURY GRAND MARQUIS			
GS Sedan	11,476	11,590	11,248
89 MERCURY GRAND MARQUIS			
GS Sedan	9,476	9,571	9,267
90 MITSUBISHI MIRAGE			
Sedan 4 Dr	6,197	6,259	6,134
89 MITSUBISHI MIRAGE			
Sedan	4,739	4,786	4,692
90 NISSAN MAXIMA			
SE Sedan	14,666	14,813	14,518
89 NISSAN MAXIMA			
SE Sedan	12,265	12,388	12,142
90 NISSAN SENTRA			
Sedan 2 Dr	5,588	5,643	5,531
89 NISSAN SENTRA			
Sedan 2 Dr	4,261	[illegible]	4,218
90 NISSAN STANZA			
XE Sedan 4 Dr	9,310	9,402	9.217
89 NISSAN STANZA			
E Ntch 4 Dr	7,236	7,308	7,163
90 OLDS CIERA			
Coupe	8,485	8,571	8,316
Sedan	8,575	8,660	8,407
89 OLDS CIERA			
Coupe	6,545	6,612	6,414
Sedan	6,619	6,685	6,486
90 OLDS CALAIS			
Sedan	6,921	6,990	6,784
89 OLDS CALAIS			
Sedan	6,022	6,082	5,902
90 OLDS CUTLASS SUPREME			
Coupe	9,314	9,407	9,128
89 OLDS CUTLASS SUPREME			
Coupe	7,486	7,562	7,337
90 OLDS 98 REGENCY			
Sedan	13,652	13,791	13,380
89 OLDS 98 REGENCY			
Sedan	10,502	10,608	10,290
89 PLYMOUTH RELIANT			
Sedan	4,786	4,834	4,691
88 PLYMOUTH RELIANT			
Sedan	3,733	3,769	3,660
90 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	6,431	6,496	6,304
89 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	5,288	5,339	5,184
89 PLYMOUTH GRAN FURY			
Salon Sedan	4,928	4,979	4,830
88 PLYMOUTH GRAN FURY			
Salon Sedan	3,904	3,943	3,828
90 ACCLAIM			
Sedan	7,352	7,425	7,205
90 PONTIAC SUNBIRD			
LE Sedan	6,660	6,725	6,524
SE Coupe	6,570	6,634	6,437
89 PONTIAC SUNBIRD			
LE Sedan	5,520	5,575	5,408
SE Coupe	5,667	5,724	5,556
90 PONTIAC 6000			
LE Sedan	8,460	8,546	8,288
89 PONTIAC 6000			
Sedan	6,243	6,303	6,117
90 PONTIAC GRAND AM			
LE Sedan	7,772	7,851	7,618
89 PONTIAC GRAND AM			
Sedan	6,459	6,523	6,330
90 PONTIAC BONNEVILLE			
LE Sedan	11,008	11,119	10,788
89 PONTIAC BONNEVILLE			
LE Sedan	8,373	8,455	8,206
90 PONTIAC GRAND PRIX			
Coupe	9,554	9,649	9,362
89 PONTIAC GRAND PRIX			
Coupe	7,652	7,730	7,499
90 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	9,772	9,870	9,674
89 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	8,097	8,178	8,017
90 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	7,565	7,640	7,489
89 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	6,331	6,393	6,268
90 TOYOTA CRESSIDA			
Lux Sedan	15,505	15,660	15,350
89 TOYOTA CRESSIDA			
Lux Sedan	12,898	13,028	12,769
90 VOLKSWAGEN JETTA			
Sedan 4 Dr	8,349	8,433	8,264
89 VOLKSWAGEN JETTA			
Sedan 4 Dr	6,995	7,065	6,924
90 VOLVO			
240 DL Sedan	13,152	13,284	13,022
89 VOLVO			
240 DL Sedan	11,017	11,126	10,907

PRODUCTS / SERVICES

from used engine coolant. No filters are used. The Bad Ethyl distillation unit helps fleet operators minimize the expense of purchasing new antifreeze. *Finish Thompson Inc.*

Circle 232 on Inquiry Card

COMMERCIAL VEHICLE COUNTS and fleet distribution by county throughout the nation are available in *U.S. Fleet Vehicle Profiles - 1991*. It can be used as a planning and reference tool for companies targeting the commercial fleet vehicle market. *Dwights Energy Research.*

Circle 234 on Inquiry Card

PLANET EARTH RECYCLING operates a fleet of trucks which are specially designed and equipped as mobile antifreeze recycling vehicles. The used antifreeze is pumped through the truck and returned to the dealer with added inhibitors, polymers, surfactants, retardants, and dispersants. This results in a recycled antifreeze chemically superior to new antifreeze at a lower cost per gallon. *Planet Earth Recycling.*

Circle 233 on Inquiry Card

NEW OTC SOFTWARE KITS DIAGNOSE problems in 1991 Chrysler, Ford and GM vehicles. The kits can troubleshoot "Big Three" models back to 1979, and have built-in two-event snapshot "anticipators" to permit data recording and other new features. Starter kit includes a 1991 software cartridge, instruction manuals, quick reference cards, adapter cables and a GM adapter block. For owners of earlier OTC software, the firm offers update kits. *OTC Division, SPX Corp.*

Circle 228 on Inquiry Card

OKI PHONES 800 SERIES consists of two mobile phones and one mini-transportable telephone. Each offers a full range of features. Also available is the Data/Remote Link Kit option package, an intelligent RJ11 interface for the transmission of data. For added safety and convenience in the hands-free mode, the phone can be pre-programmed to answer calls automatically, allowing the driver to keep both hands on the steeringwheel. *OKI Phones.*

Circle 231 on Inquiry Card

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GAS PRICES

UNLEADED GAS
Cost Per Gallon

City	Full-Serve	Self-Serve
Juneau, AK	175.9¢	152.9¢
Mobile, AL	151.9	114.2
San Jose, CA	150.4	116.2
Denver, CO	159.8	112.2
Washington, D.C.	153.6	114.6
Tampa, FL	170.9	119.7
Maui, HI	198.6	148.2
Idaho Falls, ID	125.5	115.4
Quincy, IL	148.2	121.9
Louisville, KY	138.9	113.9
Boston, MA	141.8	129.7
Duluth, MN	140.4	128.9
Kansas City, MO	140.6	107.8
Charlotte, NC	148.4	124.9
Yakima, WA	181.4	132.4

The average U.S. full-serve gasoline price for the month of June was 139.5 cents per gallon.
The average U.S. self-serve gasoline price for the month of June was 118.6 cents per gallon.
Survey conducted during the first five working days of June 1991.
Supplied by Runzheimer International, Runzheimer Park, Rochester, WI.

EDITORIAL

Whatever women do they must do twice as well as men to be thought half as good. Luckily, this is not difficult.

Charlotte Whitton

Nobody objects to a woman being a good writer or sculptor or geneticist if at the same time she manages to be a good wife, a good mother, good-looking, good tempered, well-dressed, well-groomed, and unaggressive.

Marya Mannes

Women are like elephants to me. I like to look at them, but I wouldn't want to own one.

W.C. Fields

Why Women Are Winning

What do Charlie Whitaker (General Mills), Walter Langseder (Lipton), Les Landau (Picker X-Ray), George Wilson (CIT) and Emerson Parker (Hartford) have in common? If you are old enough to know, the easy answer is they were fleet managers in the late '50s, they were all men and they led to the formation of NAFA. There wasn't a Florence Nightingale, Joan of Arc, or Maria Sklodowska (Madam Curie, to most of us) around in what might be termed the "good old boy" network at the time. In recalling my first NAFA meeting at the now ancient (with a new name) Book-Cadillac Hotel in Detroit around 1960, the only women involved were the waitresses at the luncheon and some suspicious-looking hooker-types in the entertainment suite during the evening.

That was 30 years ago and as the cigarette commercial states, "You've come a long way, baby." While women do not yet dominate as the nation's fleet managers, they have earned a presence and respect that many are still finding difficult to accept.

Today the first valid research of active fleet accounts by a national marketer (see chart, right) shows that nearly 37 percent of the country's commercial fleet managers are women among major accounts. The results also note that, when combined with smaller fleets, women still represent more than a quarter of all managers. My count in NAFA's new roster edition of members shows 32 percent are women and I note that four out of the 11 officers and trustees are also women.

Twenty years ago, only 40 percent of all women with children participated in the U.S. labor force; today the figure has surged to 65 percent. Patsy Mance of Bristol-Myers Squibb, 1991 Professional Fleet Manager of the Year, personifies the professionalism that women have earned (against odds) along with the recognition and respect of their peers. I, for one, applaud the renaissance.

ED BOBIT

Women Fleet Managers — Commercial Contacts

Medium-size Accounts (25 - 499 units)	Total Contacts	No. of Women	%
Atlanta	70	4	5.7%
Boston	18	0	0.0%
Charlotte	89	14	15.7%
Cincinnati	24	9	37.5%
Dallas	29	5	17.2%
Denver	104	17	16.3%
Detroit	66	9	13.6%
Houston	7	1	14.3%
Kansas City	35	7	20.0%
Los Angeles	26	4	15.4%
Memphis	10	2	20.0%
Milwaukee	65	6	9.2%
Minneapolis	53	3	5.7%
New Orleans	60	0	0.0%
New York City	26	0	0.0%
Orlando	7	2	28.6%
Philidelphia	31	7	22.6%
Pittsburgh	41	5	12.2%
Portland	26	6	23.1%
San Francisco	49	17	34.7%
St. Louis	18	6	33.3%
Syracuse	45	7	15.6%
Washington D.C.	28	6	21.4%
Total Contacts	**927**	**137**	**14.8% (Medium-Size)**
Major Accounts	**821**	**303**	**36.9% (Over 500)**
Grand Total	**1,748**	**440**	**25.2%**

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august 1991

automotive FLEET®

CAR AND LIGHT TRUCK FLEET AND LEASING MANAGEMENT MAGAZINE

1992 Sneak Preview

- *New Cars and Trucks*
- *Lessor Selectors*
- *Latest Fleet Incentives*

Plus

When Not to Dual Lessors

How GE is Integrating LMV

Class 3-4
Sales Surge

1992 Chrysler New Yorker
Fifth Avenue
and New Yorker Salon

automotive FLEET®

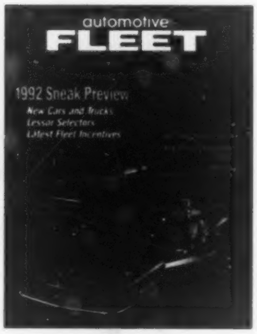
CAR AND LIGHT TRUCK FLEET AND LEASING MANAGEMENT MAGAZINE

August 1991
VOL. 30, NO. 10

Influencing the management of 5,072,000 cars and 2,209,000 light trucks and vans in business, leasing, rental, utility, government, police, and taxi fleets.

Page 32 *— The all-new Ford Crown Victoria and other new models are profiled in this month's sneak preview of 1992-model year offerings.*

Page 96 *— The Mitsubishi Fuso FE is an example of the growing product availability in the Class 3-4 segment.*



On the Cover: *Hal Barton, general manager, Chrysler Corp. Fleet Operations, is shown with the 1992 Chrysler New Yorker Fifth Avenue and New Yorker Salon.*

Features

32 **A Preview of New 1992 Cars and Trucks**
Safety is the buzzword for the next model year.

37 **1992-Model Year Lessor Selectors Premiere**
The major lessors have released their fleet selectors for the upcoming model year. Safety plays a major role.

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Chrysler, Ford, Lincoln-Mercury, Mazda, Nissan, Subaru, and Toyota's 1992-model year fleet programs.

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77 **GM Sponsors First-Ever Fleet Safety Symposium**
General Motors invited representatives from more than 100 fleets to attend an intensive two-day fleet safety meeting.

80 **Multiple Lessors May Mean Multiple Problems**
Last month, AF *presented the view in favor of using multiple lessors. This article presents the opposite opinion.*

86 **Survey Shows Corporate Fleet Personal Use Policies**
Fleet managers in control of more than a half-million vehicles respond to NAFA's annual survey.

90 **GM's Expertec™ tech 1® System Modernizes Customer Service**
A new diagnostic tool allows technicians to plug directly into a vehicle's on-board computers.

92 **1992-Model Year Car Specifications**
A model-by-model rundown by class showing the dimensions and spec's of popular fleet vehicles.

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96 **What's Behind the Sales Surge in Class 3-4 Trucks?**
Class 3-4 truck sales have risen from less than 10,000 in 1980 to now more than 60,000 annually. Here's an explanation.

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Survey Shows Corporate Fleet Personal Use Policies

Conducted by the National Association of Fleet Administrators, the 1991 Personal Use Survey presents the views of fleet managers responsible for more than a half-million vehicles.

The 1991 Personal Use Survey conducted by the National Association of Fleet Administrators (NAFA) represents personal use policy responses of 405 fleet managers controlling 525,333 vehicles, 259,813 of which are company-owned vehicles and 265,520 of which are leased. Returned questionnaires represent 23 percent of the association's membership, who manage corporate fleets in such diverse industries as finance and banking, foods and beverages, drugs and cosmetics, as well as many others. Also shown are the responses from fleet managers of public utilities, and governmental fleets.

Does Your Company Allow Personal Use of a Fleet Vehicle by Employees?

	% yes	%no
Corporate	95	5
Public Utility	54	46
Government	36	64
Other	80	20
All Fleets	**85**	**15**

Are Employees Charged for Personal Use of a Fleet Vehicle?

	% yes	%no
Corporate	89	11
Public Utility	92	8
Government	43	57
Other	81	19
All Fleets	**86**	**14**

When defining the factors governing the assignment of fleet-provided vehicles, 60 percent of corporate fleet managers say that job function is most important. Job title was second at 58 percent, and this is the factor that determines the assignment of vehicles eligible for personal use at Cox Enterprises, Inc., where Patsy Brownson, certified automotive fleet manager, is the fleet administrator. "Job title is the deciding factor. We have a lot of controllers, general sales managers, and other executives out in the field who are driving a total of 500 cars all together. All other vehicles are not personal use vehicles, and are parked at our locations each night," explains Brownson.

Personal use is allowed in 95 percent of all corporate fleets, according to the survey and 93 percent of corporate respondents say that personal use is allowed at all times or whenever necessary.

Although Cox' fleet has no specific policy on members of the employee's family using a company-provided vehicle, Brownson says there is an informal one. "We try to limit it to the spouse of the employee or anyone in the family 21 or older," says Brownson. "We really haven't had any problems with that." The practice of allowing family members to operate company-provided vehicles seems to be the norm among corporate fleets, with only 13 percent of the corporate respondents saying that it's "employee only" when it comes to personal use. The employee's spouse is authorized to use the vehicle, according to 78 percent of respondents, and licensed children also are allowed to use the vehicle at the companies of 29 percent of the respondents.

When it comes to personal use mileage, Cox Enterprises' average

Under Which Conditions May a Fleet Vehicle be Driven for Personal Use?

1 = At all times / Whenever necessary
2 = Only to and from work
3 = Only while working
4 = Only on weekends and holidays
5 = Only on vacations
6 = Other

	1	2	3	4	5	6
Corporate	93%	3%	*	*	*	3%
Public Utility	69%	23%	0	0	0	8%
Government	27%	66%	0	0	0	7%
Other	82%	5%	0	3%	0	10%
All Fleets	**88%**	**7%**	*	**1%**	*	**4%**

* = Less than 0.5% of respondents

What Factors Govern Assignment of Fleet-Provided Vehicles?

1 = Annual business miles driven
2 = Fringe benefit
3 = Job title
4 = Job function
5 = Other

	1	2	3	4	5
Corporate	41%	19%	58%	60%	5%
Public Utility	42%	17%	42%	71%	4%
Government	33%	20%	52%	83%	13%
Other	30%	28%	55%	68%	6%
All Fleets	**39%**	**20%**	**56%**	**64%**	**6%**

How Many Miles Per Month is Your Typical Fleet Vehicle Driven?

Corporate	2,087
Public Utility	1,478
Government	1,318
Other	2,022
All Fleets	**2,024**

How Many Miles of This Is for Personal Use?

Corporate	352
Public Utility	568
Government	131
Other	346
All Fleets	**350**

Personal Use of Alternate-Fueled Vehicles

The Northrop Corp. in Hawthorne, CA, allows the drivers of its company-sponsored, alternate-fueled van pool program to use the propane-powered vehicles for personal use. "Any Northrop employee can sign up to participate in our van pools," says Lynn Cariaso, van pool administrator for Northrop. "And anyone can sign up to be a van-pool driver. Drivers are allowed 200 free miles of personal use per month, as compensation for keeping the van fueled, cleaned, filling out paperwork, reporting any problems with the vehicle, and also taking it home at night." Drivers must also obtain a Class B license, which allows them to operate vehicles carrying 12 or more passengers, pass a DMV physical, and have a clean driving record. Northrop has 137 vehicles in its van-pool program, with approximately 125 vans already in use on a van pool route. The vans are virtually the only vehicles that Northrop authorizes for personal use, and all other Northrop vehicles are either left at Northrop facilities at night or assigned to executives or salespeople who are instructed that personal use of these vehicles must be kept to a minimum. Because the vans are propane fueled, drivers do not have to pay for any of their personal-use fuel unless they exceed the maximum monthly mileage, after which they pay a per-mile fee for personal use. "It works out to approximately 27 cents per mile," explains Cariaso. "Passengers in the pool also have a fee deducted from their salaries to help defray costs, because the van pool is considered a form of compensation by the IRS."

How Do You Determine What to Charge Employees for Personal Use of a Fleet Vehicle?

1 = Annual lease value
2 = Average cents per mile expense
3 = Total fleet average
4 = Other

	1	2	3	4
Corporate	39%	21%	10%	30%
Public Utility	33%	25%	0	42%
Government	0	29%	0	71%
Other	42%	9%	6%	43%
All Fleets	**38%**	**20%**	**9%**	**33%**

is much higher than that of the survey, primarily because its vehicles are viewed as "perk" cars. "A ballpark estimate for personal use mileage is around 45-50 percent of total mileage," says Brownson, while NAFA's survey shows that the personal use mileage average for all suveyed fleets is 18 percent of total mileage.

Drivers of Cox Enterprises executive-assigned vehicles still have to pay for their personal use of company vehicles, however, as is the case at 89 percent of the respondents' companies.

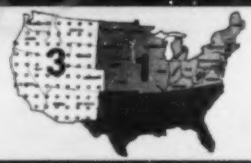
Cox also uses the most common method among survey respondents for determining the value of personal use: annual lease value (38 percent). "Employees are taxed once a year based on the vehicle's annual lease value," explains Brownson. "The amounts they are charged for personal use are all based on IRS guidelines. Drivers track their own mileage, break it down between business and personal use then fill out a form and send it in to us and then we do the required calculations. A personal use program actually can be fairly time-consuming and complicated, mainly because of all the regulations and paperwork involved. There are several different areas to take care of — payroll taxes and income, and all the different calculations."

Just as when vehicles are used for business use, there is always a chance that the driver will be involved in an accident while driving the vehicle for personal use. Only 28 percent of corporate fleets say that they charge for any portion of repair costs resulting from accidents during personal use, while the clear majority (72 percent) say they do not, as is the case at Cox Enterprises. "Accidents are treated just as they are when they occur during company business," says Brownson. "The company doesn't charge anything back for repair or damage amounts."

Other results of the personal use survey show that most corporate respondents simply use the cost of the vehicle to determine its fair market value (55 percent); and that corporate fleets typically charge a flat per-mile charge for personal use (46 percent). Other survey results indicated that employees who use their personal vehicles for business are reimbursed typically by a per-mile rate (85 percent); and that only seven percent of corporate fleets have been audited by the Internal Revenue Service, and that the audit included the fleet's personal use policies. AF

USED-CAR PRICES

The following are average used-car prices for the period ending July 10,1991. Prices are based on wholesale activity at major dealers across the country. They are divided into three zones as indicated on the accompanying map. These averages are calculated electronically. They are based on clean cars only. Proper allowance should be made for upgrading sharp cars and proper deduction taken for fair cars. Automatic transmissions have been included in the averages of all models. This information is published in *Automotive Fleet* by special permission of *Automotive Market Report.*



	AVERAGE AUCTION PRICE		
Model	**Zone 1**	**Zone 2**	**Zone 3**
89 BUICK SKYHAWK			
Coupe	5,623	5,678	5,506
Sedan	5,700	5,758	5,586
88 BUICK SKYHAWK			
Coupe	4,585	4,634	4,492
Sedan	4,650	4,696	4,558
90 BUICK SKYLARK			
Cust Sedan	7,810	7,887	7,655
89 BUICK SKYLARK			
Cust Sedan	6,569	6,636	6,440
90 BUICK CENTURY			
Cust Sedan	8,419	8,503	8,249
89 BUICK CENTURY			
Cust Sedan	6,599	6,665	6,466
90 BUICK LESABRE			
Cust Sedan	10,807	10,917	10,594
89 BUICK LESABRE			
Cust Sedan	8,419	8,502	8,248
90 CADILLAC DEVILLE			
Coupe	17,580	17,755	17,229
Sedan	17,758	17,937	17,404
89 CADILLAC DEVILLE			
Coupe	14,646	14,792	14,355
Sedan	14,807	14,957	14,511
90 CADILLAC SEVILLE			
Sedan	18,047	18,226	17,685
89 CADILLAC SEVILLE			
Sedan	14,910	15,060	14,611
90 CHEVY BERETTA			
Coupe	7,862	7,941	7,704
89 CHEVY BERETTA			
Coupe	6,621	6,688	6,488
90 CHEVY CORSICA			
Hatchback 5 Dr.	7,539	7,617	7,391
89 CHEVY CORSICA			
Hatchback 4 Dr	6,202	6,265	6,078
90 CHEVY CAVALIER			
Sedan	5,875	5,932	5,756
89 CHEVY CAVALIER			
Sedan	5,193	5,244	5,089
89 CHEVY CELEBRITY			
Sedan	5,982	6,042	5,861
88 CHEVY CELEBRITY			
Sedan	4,765	4,813	4,670
90 CHEVY CAPRICE			
Sedan	8,579	8,666	8,409
89 CHEVY CAPRICE			
Sedan	6,738	6,807	6,603
90 CHRYSLER LEBARON			
Sedan	9,507	9,602	9,318
89 CHRYSLER LEBARON			
Highline Sedan	6,379	6,441	6,248
90 CHRYSLER NEW YORKER			
Salon Sedan	11,322	11,437	11,097
89 CHRYSLER NEW YORKER			
Sedan	9,660	9,754	9,466
89 CHRYSLER FIFTH AVENUE			
Sedan	9,762	9,854	9,563
88 CHRYSLER FIFTH AVENUE			
Sedan	7,635	7,711	7,481
89 DODGE ARIES AMERICA			
Sedan	4,749	4,795	4,651
88 DODGE ARIES AMERICA			
Sedan	3,722	3,759	3,647
90 DODGE SHADOW			
Liftbk 5 Dr	6,482	6,548	6,355
89 DODGE SHADOW			
Liftbk 5 Dr	5,347	5,398	5,242
90 DODGE DYNASTY			
Sedan	8,772	8,860	8,598
90 FORD ESCORT			
Htchbk 4 Dr LX	5,614	5,672	5,501
89 FORD ESCORT			
Htchbk 4 Dr LX	4,492	4,537	4,403
90 FORD MUSTANG			
LX-4 Coupe	7,455	7,532	7,308
89 FORD MUSTANG			
LX-4 Coupe	6,022	6,081	5,902
90 FORD TEMPO			
GL Sedan 4 Dr	6,707	6,775	6,572
89 FORD TEMPO			
GL Sedan 4 Dr	5,345	5,399	5,237
90 FORD TAURUS			
GL Sedan 4 Dr	9,232	9,325	9,049
89 FORD TAURUS			
GL Sedan 4 Dr	6,949	7,019	6,806
90 FORD CROWN VICTORIA			
Sedan	10,834	10,943	10,616
89 FORD CROWN VICTORIA			
Sedan	8,841	8,930	8,666
90 THUNDERBIRD			
Coupe	9,698	9,795	9,504
89 THUNDERBIRD			
Coupe	8,210	8,291	8,046
90 LINCOLN			
Town Car Sedan	18,072	18,252	17,712
Mark VII LSC Coupe	17,264	17,436	16,918
Continental Sedan	16,527	16,693	16,196
89 LINCOLN			
Town Car Sedan	13,349	13,484	13,082
Mark VII LSC Coupe	14,316	14,459	14,032
Continental Sedan	14,249	14,392	13,965
90 MAZDA 626			
LX Sedan 4 Dr	10,332	10,435	10,229
90 MERCURY COUGAR			
LS Coupe	10,347	10,449	10,136
89 MERCURY COUGAR			
LS Coupe	8,755	8,842	8,580
90 MERCURY TOPAZ			
GS Sedan 4 Dr	6,869	6,941	6,736
89 MERCURY TOPAZ			
GS Sedan 4 Dr	5,487	5,543	5,379
90 MERCURY SABLE			
GS Sedan 4 Dr	9,321	9,413	9,133
89 MERCURY SABLE			
GS Sedan 4 Dr	7,003	7,072	6,861
90 MERCURY GRAND MARQUIS			
GS Sedan	11,293	11,406	11,069
89 MERCURY GRAND MARQUIS			
GS Sedan	9,372	9,466	9,185
90 MITSUBISHI MIRAGE			
Sedan 4 Dr	6,209	6,271	6,147
89 MITSUBISHI MIRAGE			
Sedan	4,725	4,772	4,678
90 NISSAN MAXIMA			
SE Sedan	14,622	14,769	14,474
89 NISSAN MAXIMA			
SE Sedan	12,204	12,326	12,081
90 NISSAN SENTRA			
Sedan 2 Dr	5,549	5,603	5,492
89 NISSAN SENTRA			
Sedan 2 Dr	4,261	4,304	4,218
90 NISSAN STANZA			
XE Sedan	9,245	9,337	9,152
89 NISSAN STANZA			
Ntch 4 Dr	7,897	7,976	7,819
90 OLDS CIERA			
Coupe	8,485	8,571	8,315
Sedan	8,127	8,211	7,966
89 OLDS CIERA			
Coupe	6,525	6,592	6,395
Sedan	6,599	6,665	6,466
90 OLDS CALAIS			
Sedan	6,942	7,011	6,804
89 OLDS CALAIS			
Sedan	6,022	6,082	5,902
90 OLDS CUTLASS SUPREME			
Coupe	9,370	9,463	9,198
89 OLDS CUTLASS SUPREME			
Coupe	7,507	7,585	7,359
90 OLDS 98 REGENCY			
Sedan	13,625	13,763	13,353
89 OLDS 98 REGENCY			
Sedan	10,418	10,523	10,208
89 PLYMOUTH RELIANT			
Sedan	4,724	4,772	4,631
88 PLYMOUTH RELIANT			
Sedan	3,722	3,758	3,649
90 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	6,482	6,548	6,355
89 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	5,347	5,398	5,242
89 PLYMOUTH GRAN FURY			
Salon Sedan	4,928	4,979	4,830
88 PLYMOUTH GRAN FURY			
Salon Sedan	3,880	3,919	3,806
90 ACCLAIM			
Sedan	7,403	7,477	7,256
90 PONTIAC SUNBIRD			
LE Sedan	6,673	6,738	6,450
SE Coupe	6,583	6,647	6,537
89 PONTIAC SUNBIRD			
LE Sedan	5,542	5,597	5,358
SE Coupe	5,467	5,521	5,430
90 PONTIAC 6000			
LE Sedan	8,384	8,469	8,212
89 PONTIAC 6000			
Sedan	6,212	6,271	6,086
90 PONTIAC GRAND AM			
LE Sedan	7,788	7,867	7,633
89 PONTIAC GRAND AM			
Sedan	6,491	6,556	6,362
90 PONTIAC BONNEVILLE			
LE Sedan	10,909	11,019	10,692
89 PONTIAC BONNEVILLE			
LE Sedan	8,381	8,463	8,215
90 PONTIAC GRAND PRIX			
Coupe	9,583	9,678	9,390
89 PONTIAC GRAND PRIX			
Coupe	7,683	7,760	7,529
90 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	9,752	9,850	9,655
89 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	8,073	8,153	7,993
90 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	7,184	7,255	7,111
89 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	6,312	6,374	6,249
90 TOYOTA CRESSIDA			
Lux Sedan	15,536	15,691	15,381
89 TOYOTA CRESSIDA			
Lux Sedan	12,937	13,067	12,807
90 VOLKSWAGEN JETTA			
Sedan 4 Dr	8,374	8,458	8,289
89 VOLKSWAGEN JETTA			
Sedan 4 Dr	6,960	7,030	6,889
90 VOLVO			
240 DL Sedan	13,125	13,257	12,996
89 VOLVO			
240 DL Sedan	10,951	11,060	10,841

PRODUCTS/SERVICES

ing that would eventually end up in a landfill.

The Innobulk program consists of a national distributor network which installs and maintains 165- to 5,000-gallon bulk holding tanks at the customer's location. Cleaners are delivered and dispensed directly into the customer's tank by local distributors. The vehicle cleaners are water-based, so waste disposal problems associated with solvents, acids and non-biodegradable products are minimized. *S.C. Johnson & Son, Inc.*

Circle 237 on Inquiry Card

CHILTON'S 1991 EMISSION CONTROL MANUAL (Manual #8154) covers all 1990 and 1991 domestic and import cars, light trucks and vans, plus medium and heavy duty vehicles with gasoline engines. With expanded indexing, the manual covers complete emission servicing, component-by-component. The manual contains manufacturers' maintenance schedules, timing mark locations and complete vacuum schematics, which makes system application, identification and repair easier and quicker.

CHILTON'S
1991

Chilton's 1991 manual, in addition to containing general service information, delivers new information to help satisfy California's "BAR 90" requirements that are being adopted by more and more states across the nation. The complete line of Chilton's emission control manuals has coverage for domestic and import vehicles dating back to 1966. *Chilton Book Co.*

Circle 238 on Inquiry Card

THE ACTION CHIPKIT STOPS RUST from spreading, produces repairs that are flush with the rest of the paint, and enables paint chips and scratches to be easily fixed. The kit includes the Eliminator rust remover which has thousands of glass fibers to brush away any surface rust, grime, or wax. Once the surface is prepared, the kit's clear paint sealer is applied to permanently prevent any further rusting or blistering of surrounding paint.

The kit's microfine sanding papers and special flexible sanding block enable the repair to be made smooth and flush. Extrafine polishing compound is included with the kit to bring back the gloss and make a repair that has no visible surface irregularities. The papers and compound also enable removal of minor scrapes and black rub marks. *Pro Motorcar Products.*

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GAS PRICES

UNLEADED GAS
Cost Per Gallon

City	Full-Serve	Self-Serve
Jonesboro, AR	140.4¢	119.4¢
Kingman, AZ	173.4	120.4
Long Beach, CA	147.9	101.9
New Haven, CT	146.6	130.6
Orlando, FL	145.2	122.2
Augusta, GA	139.9	107.9
Kauai, HI	169.8	146.9
Des Moines, IA	144.4	118.9
Wichita, KS	154.9	116.9
New Orleans, LA	157.7	118.2
Kalamazoo, MI	165.9	112.9
Butte, MT	136.9	118.4
Roswell, NM	128.4	118.9
Staten Island, NY	139.4	132.9
Enid, OK	138.5	114.0

The average U.S. full-serve gasoline price for the month of July was 138.1 cents per gallon.
The average U.S. self-serve gasoline price for the month of July was 116.2 cents per gallon.
Survey conducted during the first five working days of July 1991.
Supplied by Runzheimer International, Runzheimer Park, Rochester, WI.

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30th Anniversary Issue

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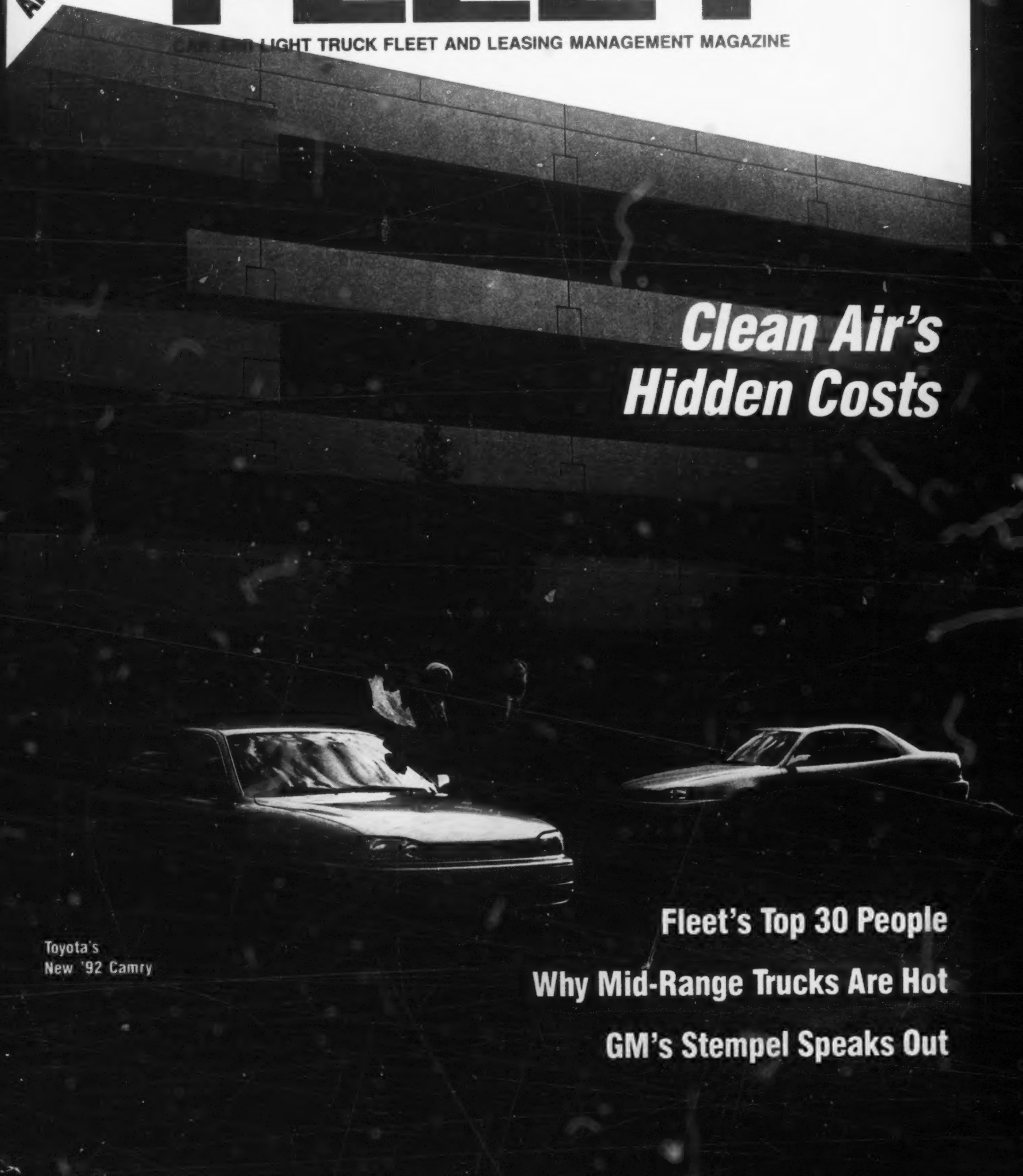
CAR AND LIGHT TRUCK FLEET AND LEASING MANAGEMENT MAGAZINE



Clean Air's Hidden Costs

Toyota's
New '92 Camry

Fleet's Top 30 People

Why Mid-Range Trucks Are Hot

GM's Stempel Speaks Out

automotive
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BOBIT PUBLISHING

CAR AND LIGHT TRUCK FLEET AND LEASING MANAGEMENT MAGAZINE

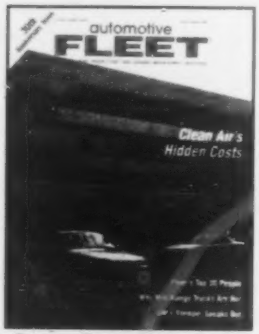
September 1991
VOL. 30, NO. 9

Influencing the management of
5,072,000 cars and 2,209,000 light trucks
and vans in business, leasing, rental,
utility, government, police, and taxi fleets.

ULTRACLEAN

Page 22—This Econoline van has been converted by Phillips 66 to be propane-powered by installing a filter shut-off valve, new carburetor, fuel microprocessor, and two LPG tanks.

Page 108—Class 4-5 trucks are gaining attention from commercial users. Pictured above is a Mitsubishi Fuso FH 100.



On the Cover: Toyota Motor Sales U.S.A.'s Robert McCurry (left), executive vice president of sales and operations, and Mike Rocco, corporate fleet manager, stand next to the 1992 Camry. For more details on the new Camry, see page 66.

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The alternate fuel requirements for the Clean Air Act Amendments of 1990 will soon come into effect. What will this cost fleets?

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Profiles of the 30 most influential people in the automotive fleet industry, past and present.

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The new Camry sports a wider wheelbase, new safety features, and a choice of two powerful engines for the 1992-model year.

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AF's first ever midyear fleet registration truck chart compares figures for the 1991- and 1990-model years.

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ARI's accident management program takes the administrative burden off fleet managers and company drivers by arranging for towing, appraisal, repairs, and subrogation.

103 **GM's Stempel Speaks out on Environmental Regulations**
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Clean Air Act Amendments Could Cost Fleets $43 Billion

Financial models analyzing the Clean Air Act show that certain centrally-fueled
cost increase, but exemptions to state transportation control measures hopes to

The nationwide cost for certain fleets to convert to mandatory usage of clean-fueled vehicles could run as high as $43 billion from 1998 to 2004, depending on the type of alternate fuel used, according to a study recently compiled by *Automotive Fleet.*

As mandated by the Clean Air Act Amendments of 1990, fleets that are located in designated non-attainment areas (see page 23 for a city listing), and which are centrally fueled or capable of being centrally fueled, will have to purchase a specified percentage of low-emission vehicles beginning in model-year 1998.

The Act does not require the use of any specific alternate fuel to meet the legislated vehicle exhaust emission requirements. Any fuel can be used, so long as the specified emission standards are attained, and it appears that reformulated gasoline and clean diesel may be able to achieve these requirements with improved catalytic converter technology.However, the Bush Administration's National Energy Strategy proposal presently before Congress contains fleet provisions that would not allow the use of petroleum-based fuels.

This article will provide cost projections for operating a mixed fleet of gasoline-fueled vehicles and specific percentages of alternate-fueled vehicles powered by one of the following fuels: methanol, compressed natural gas (CNG), and ethanol. These cost projections by fuel mix (gas/methanol, gas/CNG, and gas/ethanol) will be compared against the cost of operating a gasoline only fleet. This analysis covers a seven-year period from model-years 1998-2004. (The financial and operational aspects of other fuels, such as propane, reformulated gasoline, clean diesel, and electric power, will be examined in subsequent issues.)

Estimated Nationwide Fleet Compliance Cost

Fuel Type Selected	Est. 1998-2004 Cost	Increase Compared to Gasoline
All-Gasoline Fleet	$179.2 Billion	—
Gas/Methanol Fleet Mix	$209.4 Billion	+ $30.2 Billion
Gas/CNG Fleet Mix	$212.2 Billion	+ $33.0 Billion
Gas/Ethanol Fleet Mix	$222.7 Billion	+ $43.5 Billion

The cumulative nationwide fleet cost to transition to certain alternate fuels is presented above, along with their increased expense when compared against operating a gasoline-only fleet.

Number of Vehicles Affected

In order to estimate the industry-wide cost to fleets to satisfy the Clean Air Act requirements, it was necessary to determine the approximate number of vehicles actually affected by this legislation. Based on a survey conducted by Dwights Energy Research, headquartered in Denver, CO, there are approximately 1.8 million vehicles (consisting of 585,000 cars and over 1.26 million trucks) that are centrally fueled in the 21 designated non-attainment areas. This 1.8-million-unit figure is a conservative estimate of the number of vehicles covered by the legislation, since it doesn't take into account those fleets that are *capable of being centrally fueled.* The reason these fleet vehicles were not included in this estimate was because there is presently no official definition of the term, "*capable of being centrally fueled.*" The Environmental Protection Agency is presently formulating a definition and expects to present it for public comment, along with other matters, in the fall of 1991.

Nationwide Financial Impact

Based on this universe of 1.8 million vehicles, *Automotive Fleet* projected the nationwide cost of converting to either methanol, CNG, or ethanol fleets to be $30 to $43

of 1990 Plus

fleets will bear a staggering
mitigate some of this expense.

billion from 1998 to 2004. These cost projections conservatively assume a zero vehicle-population growth within these affected fleets during this seven-year period.

The first phase-in year for fleets to acquire alternate-fueled vehicles will be the 1998-model year. At that time, 30 percent of all 1998-model fleet acquisitions (purchases and/or leases) of vehicles less than 26,000 lbs. in non-attainment areas will have to be alternate-fueled. Realistically, the purchase/lease of these units will commence with fleet ordering in mid-1997 for delivery in the fall of 1997. In this context, alternate-fueled vehicle compliance by affected fleets is only 70 months away.

Furthermore, in the 1999-model year, the annual acquisition rate for alternate-fueled vehicles increases to 50 percent and then to 70 percent by the 2000-model year and all years thereafter.

The preceding cost projections for operating these four fleet types were based on analyzing and quantifying 27 different fleet expense categories such as vehicle acquisition cost, book depreciation, projected resale value, maintenance, fuel, accident/repair, insurance, and tax/registration, to name a few. All cost calculations were based on a benchmark car and truck.

It is important to emphasize that we chose to err on the side of caution and all cost calculations used in this article are extremely conservative, especially our estimated engine deducts at resale of alternate-fueled vehicles.

The Letter of the Law: The Alternate Fuel Fleet Provisions

The Clean Air Act Amendments of 1990 were signed into law in November 1990 after nearly 10 years of consideration and an additional year of hot debate. The following is a summary of the alternate fuel requirements for designated fleets as mandated by the Clean Air Act Amendments of 1990.

Fuels Required

The term "clean alternative fuel" means any fuel including methanol, ethanol, reformulated gasoline, diesel, natural gas, liquefied petroleum gas, or electricity used to power a vehicle that complies with the exhaust emission standards required by the Act.

Areas Covered

There are 21 major metropolitan areas throughout the U.S. that fall under the requirements of the law. These areas are:

Atlanta,GA;
Bakersfield, CA;
Baltimore, MD;
Baton Rouge, LA;
Beaumont-Port Arthur, TX;
Boston-Lawrence, MA;
Chicago-Gary-Lake County, IL, IN, WI;
Denver-Boulder, CO;
El Paso, TX;
Fresno, CA;
Hartford, CT;
Houston-Galveston-Brazoria, TX;
Los Angeles-Anaheim-Riverside, CA;
Milwaukee-Racine, WI;
New York, NY, NJ, CT;
Philadelphia-Wilmington-Trenton, PA, MD, NJ, DE;
Providence-Pawtucket-Fall River, RI, MA;
Sacramento, CA;
San Diego, CA;
Springfield, MA;
Washington, D.C., MD, VA.

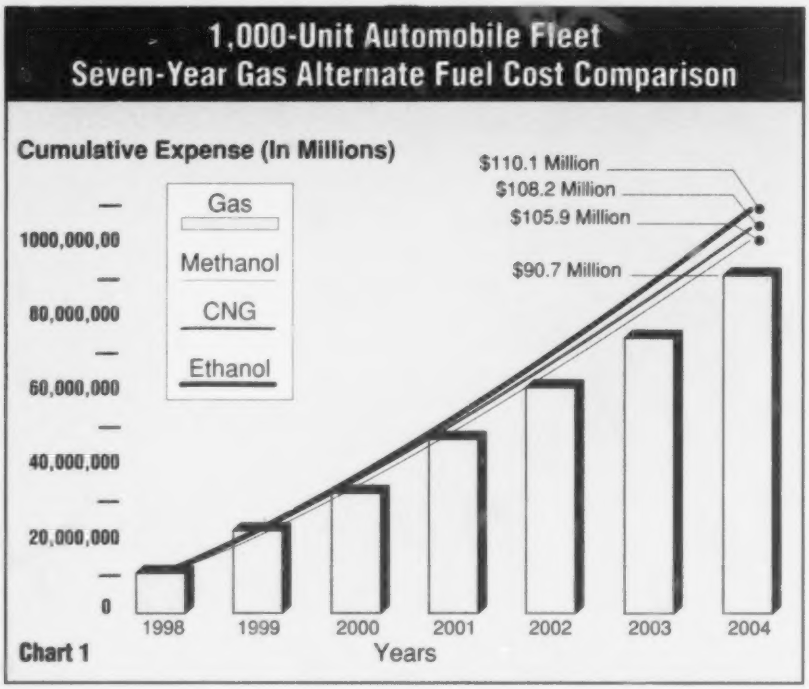
Fleets Covered by Law

All company and government fleets with 10 or more vehicles located in a designated non-attainment area are potentially covered by the legislation. Certain fleet vehicles are exempt such as rental cars, police units, and emergency vehicles. Only that portion of a covered fleet's vehicles which are centrally fueled or capable of being centrally fueled are subject to the alternate-fueled vehicle purchase mandate. The legislation covers all automobiles and trucks (26,000 lbs. or less gross vehicle weight). Vehicles garaged at a personal residence at night are not considered capable of being centrally fueled.

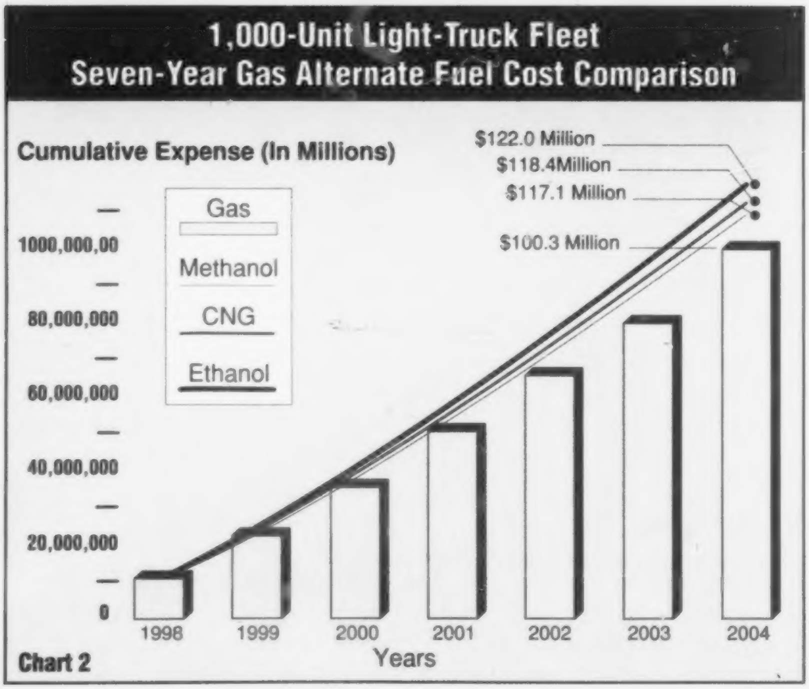
Alternate Fuel Vehicle Phase-In Period

Covered fleets are required to allocate a percentage of their new-vehicle purchases to clean fuel vehicles based upon the following timetable.

	MY 1998	**MY 1999**	**MY 2000**
Vehicles up to 8,500 lbs. GVW	30%	50%	70%
Vehicles above 8,500 lbs. GVW	50%	50%	50%



A company with a 1,000-car fleet (Chart 1) can anticipate a fleet cost increase over a comparable gasoline-powered fleet from $15.2 to $19.4 million over a seven-year period. Annually, this translates into an average cost increase of $2.2 to $2.8 million, depending on the type of fuel used. Correspondingly, a truck fleet (Chart 2) numbering 1,000 units can expect an increase ranging from $16.9 to $21.8 million from 1998 to 2004. The average annual truck expense during this period would be $2.4 to $3.1 million. By analyzing these two hypothetical 1,000-unit fleets, you can proportionately approximate your potential alternate-fuel fleet expense. For instance, if you had a 500-car fleet, your expenses would be half of that projected for the hypothetical 1,000-car fleet, and so forth for truck fleets.



Hypothetical 1,000-Unit Fleets: Alternate Fuels vs. Gasoline

Of the 1.8 million fleet vehicles potentially affected by the legislation, 32 percent are cars and 68 percent are trucks.

Since trucks are more expensive to operate than cars, this analysis postulates a hypothetical car fleet and a separate hypothetical truck fleet to project fleet compliance costs. The benchmark car model selected to represent a typical fleet-equipped sedan was the Ford Taurus L, while a Chevrolet C3500 regular cab pickup was selected as the base truck model.

Chart 1 diagrams the projected cumulative expense of a 1,000-car-only fleet of gas-powered units *mixed with alternate-fueled cars.* The percentage mixture of the alternate fuels to gas-powered cars during this time frame is based on the mandated fleet phase-in schedule. (See page 23.) In addition, the cumulative expense of the mixed fleet is compared against the cost of running 1,000 gasoline-powered cars from 1998 to 2004. Chart 2 examines the same expenses, but for a 1,000-unit truck fleet.

We want to focus your attention on the cost *difference* between alternative fuels and gasoline. In a mixed fleet of methanol- and gasoline-powered vehicles, during a seven-year period there would be an additional cost of $15,251,000 beyond what it would cost to run a comparable gasoline-only fleet. This represents an additional average annual fleet expense of $2,179,000.

Similarly, a combined CNG/gas fleet would accrue an additional $17,465,000 in expenses, while the additional cost to run a combined gasoline and ethanol fleet over a seven-year period would be $19,389,000.

Also, based over a seven-year time frame, the cost increases for a 1,000-unit truck fleet ranged from $16,891,000 for a gas/methanol mixture, to $18,163,000 for CNG/gas, and $21,790,000 for ethanol/gas. This represents an average ex-

1,000-Unit Car Fleet: Cost Difference Between Alternative Fuels and Gas

The Methanol Car Fleet:	
Additional gas/methanol fleet expense over gas at seven years:	$15,251,000
Additional average annual fleet expense increase:	$2,179,000
The CNG Car Fleet:	
Additional gas/CNG fleet expense over gas at seven years:	$17,465,000
Additional average annual fleet expense increase:	$2,495,000
The Ethanol Car Fleet:	
Additional gas/ethanol fleet expense over gas at seven years:	$19,389,000
Additional average annual fleet expense increase:	$2,770,000

1,000-Unit Truck Fleet: Cost Difference Between Alternative Fuels and Gas

The Methanol Light-Truck Fleet:	
Additional gas/methanol fleet expense over gas at seven years:	$16,891,000
Additional average annual fleet expense increase:	$2,413,000
The CNG Light-Truck Fleet:	
Additional gas/CNG fleet expense over gas at seven years:	$18,163,000
Additional average annual fleet expense increase:	$2,595,000
The Ethanol Light-Truck Fleet:	
Additional gas/ethanol fleet expense over gas at seven years:	$21,790,000
Additional average annual fleet expense increase:	$3,113,000

pense which ranges from $2.4 to $3.1 million per year.

The key factors that make alternate-fuel usage more expensive than gasoline are: vehicle acquisition cost, projected resale value, and operating expenses centering on maintenance, fuel cost, and miles-per-gallon fuel economy. Each of these expense factors are examined by alternate fuel type in Chart 5 on page 30.

Projected Resale Values For Alternate-Fuel Vehicles

Although fleets generally think of used-vehicle sales in terms of the wholesale market, the ultimate buyers of out-of-service fleet units will continue to be the retail consumer.

A critical financial aspect of the Clean Air Act is that the car-buying consumer is not required to purchase an alternate-fueled vehicle.

This raises the question about the potential resale value of these vehicles. At first examination, it appears that the resale values of alternate-fueled vehicles will be extremely low. For instance, how many people do you know that would be interested in paying $400-$1,700 more for a car whose fuel expense is 25 to 100 percent greater? Or pay 10 to 20 percent more to maintain and repair a vehicle, while getting 20 to 79 percent less fuel mileage than a comparable used car with a gas-powered engine?

If new-car buyers reject alternate-fueled vehicles, will used-car buyers similarly reject used alternate-fuel vehicles for the same reasons? Used-car preferences usually mirror new-car preferences. A used-car buyer is typically a *would-be new car buyer* who is financially forced to settle for a similar, but used, model because it costs less.

Net depreciation is already the number one expense for fleet operations and a low resale return on alternate-fueled vehicles promises to further inflate depreciation expenses.

The first two-year-old alternate-fueled fleet units will hit the used-car market as early as 2000-2001. It

Banking on Credits and Exemptions

One way to minimize the number of alternate-fueled vehicles a covered fleet would have to acquire and operate is to purchase "credits" from other fleets that have exceeded their requirements.

As part of the Clean Air Act Amendments of 1990, credits will be available to fleets that either:

1) Purchase more clean fuel vehicles than required;

2) Purchase vehicles that are less polluting than the statutory standards;

3) Purchase clean fuel vehicles that are not otherwise covered under the Clean Air Act Amendments; or

4) Purchase clean fuel vehicles prior to the mandated phase-in period.

These credits are "bankable" and can be used in future years and should the covered fleet not be able to meet its purchase mandates that year or they could be traded or sold to another covered fleet in the same area.

TCM Exemptions

This provision provides clean-fueled fleets an exemption from current and forthcoming *transportation control measures* (TCM) that are implemented by individual states as a means to control motor vehicle usage.

Examples of current TCMs are high-occupancy vehicle lanes, while an example of a proposed TCM is the possible closure of roads during particular times of the day or days of the week, as is being considered by the District of Columbia for possible implementation in 1998.

According to the Clean Air Act, the EPA Administrator will develop regulations that will exempt clean-fuel vehicles from adhering to these locally-imposed transportation control measures.

is anticipated that the future supply of used alternate-fueled vehicles with high mileage will far exceed low consumer demand. As a result, the bottom line net depreciation expense for affected fleets will become progressively worse as used-car consumers continue to prefer gasoline-powered vehicles due to their lower cost and ease of operation. As a result, used-car alternate-fueled engine deducts of $2,000 were estimated in our methanol/ethanol fleet expense projections, and the CNG engine deduct was increased to $3,000 because its fuel tank requirements sacrificed trunk space. It's important to add that these projected alternate fuel engine resale losses are extremely conservative estimates.

It is entirely conceivable, even

Chart 5: The Financial Impact of Three Alternate Fuels

Methanol Cost Factors

- **Fuel Cost:** To travel the same distance as with a gallon of gasoline, you would have to pay at least 25 cents more for methanol.
- **Fuel Economy:** The average miles-per-gallon fuel economy of a methanol-powered car is 40 percent less than a comparable gasoline-powered car.
- **Operating Expense:** It is estimated that a methanol-powered car will be 20 percent more expensive to maintain and repair since methanol is a highly corrosive fuel and is extremely hard on engine oil.
- **Acquisition Cost:** Automobile manufacturers currently predict an average additional acquisition cost of $400 per methanol-powered car over the equivalent gas-powered model specified with the same equipment.
- **Resale Value:** A $2,000 engine deduct is estimated due to anticipated low consumer demand for high mileage used alternate-fueled vehicles.

Methanol Cost Assessment: Overall, fleets can anticipate an estimated five percent cost increase over a comparable gasoline-only fleet following the initial acquisition of 30 percent methanol-powered vehicles in 1998. By 2004, fleet expense will then increase annually to 22 percent over a comparable gasoline-powered fleet with a 70 percent acquisition rate for alternate-fueled vehicles.

CNG Cost Factors

- **Fuel Cost:** To travel the same distance as with a gallon of gasoline, you would have to pay at least 50 cents more for CNG.
- **Fuel Economy:** A CNG-powered vehicle has 79 percent lower fuel economy than gasoline.
- **Other Expenses:** CNG usage requires a special, larger fuel tank which occupies most of the vehicle's trunk area. The cost of each CNG fuel tank is estimated to be more than $1,200. CNG-powered vehicle are currently limited to a 120-mile driving radius with a single fuel tank. A second fuel tank would be required for the vehicle to operate beyond a 120-mile radius.
Currently, the average cost to convert an engine from gasoline to CNG is $2,400 per vehicle.
- **Acquisition Cost:** Automobile manufacturers currently estimate the additional acquisition cost for a new CNG vehicle at $500 and up compared to a gas-powered counterpart with comparable equipment. This figure does not include the $1,200 cost for installing a special fuel tank. Altogether, the minimum initial cost of a CNG vehicle will be $1,700 or more.
- **Resale Value:** A $3,000 engine deduct since trunk space is lost to accommodate a larger fuel tank.

CNG Cost Assessment: Fleets can anticipate a 5.2 percent overall cost increase at the time of the initial 30 percent CNG phase-in in 1998. Expenses will continue to rise annually to a projected level of almost 23 percent with 70 percent CNG integration by 2004.

Ethanol Cost Factors

- **Fuel Cost:** Ethanol presently costs twice as much as gasoline.
- **Fuel Economy:** Ethanol's miles-per-gallon fuel economy averages 20 percent less than a comparable gasoline-powered car.
- **Operating Expense:** It is estimated that an ethanol-powered car would cost 10 percent more to maintain and repair than the equivalent gas-powered model. Although ethanol is less corrosive than methanol, it is still more corrosive than gasoline.
- **Acquisition Cost:** Automobile manufacturers currently predict an average minimum additional acquisition cost of $400 for an ethanol-powered car over the same comparably equipped gas-powered model.
- **Resale Value:** A $2,000 engine deduct is estimated due to anticipated low consumer demand for high mileage used alternate-fueled vehicles.

Ethanol Cost Assessment: Fleets can expect an estimated 6.4 percent cost increase using ethanol-powered vehicles by 1998. Fleet expense will then increase annually to a projected level of 28 percent with 70 percent ethanol integration by 2004.

probable, that the alternate-fueled vehicles mandated upon fleets will recover very little of their original cost at resale. This will drive net depreciation, already a fleet's largest cost, even higher than estimated in our preceding cost projections.

Operational Impact of Alternate Fuels

Another unresolved question is what indirect cost will widespread alternate fuel usage have on day-to-day fleet operations? For instance, methanol engines are difficult to start below 40 degrees Fahrenheit. How will this affect winter operations for snow-belt fleets? Methanol is toxic if swallowed or absorbed through the skin and if a methanol-fueled vehicle should catch fire, such as in an accident, the fuel burns invisibly if not mixed with gasoline. What changes will then be required in the workplace to safeguard against methanol-related mishaps.

Another operational concern is fuel availability. If there is widespread usage of ethanol by fleets, it is feared that there may be limited fuel availability because of the limited volume of grain and corn stocks that can be diverted to fuel production.

Clean Air Act May Encourage Employee Reimbursement

The passage of the Clean Air Act Amendments of 1990 does not mean that all fleets must convert to alternate-fueled vehicles. By following the letter of the law, fleets can choose among several approaches to comply with the legislation, while avoiding the high costs of operating alternate-fueled vehicles. Reimbursement programs for employee-owned vehicles may become an attractive alternative to fleets facing dramatic cost increases due to the clean air legislation.

All fleets with 10 or more vehicles fall under the provisions of the Clean Air Act Amendments of 1990. Companies may find it more cost effective to set up driver-reimbursement programs, where employees use their own vehicles for business purposes and are provided an allowance by the company for vehicle-related expenses. An alternative approach might be for a company to assist employees finance vehicles (even trucks with complex equipment) to be used for business purposes.

Both of these approaches would release the company from the alternate-fuel vehicle requirements of the clean air legislation. This may be an unintended consequence of the Clean Air Act Amendments of 1990.

The Cost to Retrofit an Econoline to Run on Propane

Voluntary conversions of vehicles to alternate fuels may be used to meet the acquisition phase-in mandates, however, fleets covered by this legislation are not required to convert existing or new vehicles, or to purchase converted vehicles to meet the phase-in requirements.

But if you did want to convert vehicles to meet the phase-in requirements, here's what it would cost to convert a gas-powered van to also run on a clean fuel such as propane.

Recently, Phillips 66 Propane Co. converted a 1991 Ford Econoline van with a 460-cubic-inch engine to run on propane or gasoline at the company's Transportation Center in Bartlesville, OK.

The conversion required the installation of five major components: two large propane fuel tanks manufactured by Manchester Tank Company, a filter shut-off valve, a converter, a carburetor from Impco, and a fuel microprocessor. Conversion cost was close to $2,000.

Propane conversion systems require the addition of and adjustment to the following (approximate retail costs are listed in parenthesis):

- **Fuel Handling System**: This includes one or more heavy-steel tanks to hold propane and keep its liquefied under pressure ($300-$500).
- **Fuel Injection System**: This includes a filtered fuel lock or shut-off valve to stop fuel flow when the engine stops; a convertor or vaporizer/regulator to regulate fuel pressure, which vaporizes propane, and meters it into the carburetor; and the carburetor itself ($300-$400).
- **LPG Fuel Microprocessor**: Monitors fuel flow to the engine and adjusts the air-to-fuel ratio 10 times a second for optimum engine performance ($300-$400).

Labor costs for installation can run up to $500 and are affected by whether converted vehicles will be dual-fuel or propane-only; age and condition of the vehicles; and number of vehicles to be converted. Miscellaneous costs for lines, fittings, connectors, and valves cost approximately $200.

The fleet cost for converting vehicles to operate on propane is also dependent on the size, number, and location of fuel tanks installed in each vehicle and the number of total vehicles converted, says Warren Carey, vice president of Phillips 66 Propane Company.

Carey said Phillips 66 expects to completely recoup conversion costs for the van within the first 50,000 miles. The company expects the van to easily exceed that mileage because of the clean-burning propane won't create maintenance problems by fouling the engine.

Midyear Car Registrations

Fleet registrations for the first six months of the 1991-model year have increased 25 percent over 1990.

MODEL	1990 Model Year Total	1990 1st 6 Mos MYTD	1991 1st 6 Mos MYTD
SUBCOMPACT			
323	2,506	1,750	3,213
Capri	330	—	118
Cavalier	60,739	32,368	42,757
Colt/Summit/Vista	1,827	114	1,017
Escort/Festiva	55,524	30,386	45,964
Excel	262	214	326
Golf/GTI/Fox	2,846	433	781
Horizon	3,745	3,167	83
Jetta	3,468	1,290	1,917
LeMans	14,490	2,534	7,577
Loyale	4,189	1,114	462
Metro	24,272	13,548	18,524
Omni	4,052	3,582	91
Precis/Mirage	13,948	10,959	10,719
Prizm	57,763	26,059	22,541
Sentra	18,925	16,044	7,491
Skyhawk	88	3	—
Sunbird	43,046	24,442	29,936
Tercel	11,813	6,575	7,144
Tracer	5,303	774	9,420
Total Subcompact	**329,136**	**175,356**	**210,081**
COMPACT			
240 SX	6,636	—	2,721
Acclaim	35,784	21,719	43,486
Aries	681	187	—
Conquest	—	2	—
Corolla	52,548	27,574	26,343
Corsica	66,037	26,725	37,297
Cutlass Calais	39,073	13,339	20,383
Eclipse/Cordia	2,333	554	1,411
Grand Am	61,915	31,693	35,799
Lancer	—	10	—
Legacy	11,128	4,458	7,739
Protege	2,875	2,457	4,052
Reliant	552	136	—
Shadow	26,588	21,524	11,009
Skylark	33,450	16,611	19,086
Sonata	134	92	1,045
Spirit	33,606	21,260	36,306
Stanza	14,986	5,275	6,247
Sundance	19,668	16,017	6,659
Tempo	85,571	48,469	61,597
Topaz	19,675	11,813	11,359
Total Compact	**513,240**	**269,915**	**332,539**
INTERMEDIATE			
626	4,175	2,742	4,928
6000	19,882	12,586	9,031
Camry	42,985	25,133	21,743
Celebrity	16,146	4,686	414
Century	31,293	18,004	18,671
Cutlass Ciera	31,100	19,850	15,416
Dynasty/Monaco	52,871	31,587	54,513
Galant	9,964	4,029	2,384
LeBaron	8,678	83	2,020
LeBaron Coupe/Convertible	18,711	8,686	9,738
Lumina	82,698	45,433	40,098
Maxima	20,227	9,701	9,915
MX-6	1,397	999	1,130
New Yorker Landau/Salon	14,432	3,554	3,109
Passat	—	172	1,320
Premier	2,620	453	630
Sable	30,450	18,157	19,249
Sigma	204	151	—
Taurus	130,101	70,794	91,496
Thunderbird	21,275	—	22,780
Volvo 244	—	1,246	—
Volvo 245	—	182	—
Volvo 744	—	299	—
Total Intermediate	**539,209**	**278.527**	**328,585**
STANDARD			
Bonneville	16,050	8,491	10,243
Caprice	53,570	23,107	24,564
Crown Victoria	48,161	16,982	32,502
Eighty Eight	12,455	5,880	11,571
Fifth Avenue	10,237	4,594	9,895
Grand Marquis	15,701	7,470	6,383
LeSabre	15,734	5,965	12,206
Total Standard	**171,908**	**72,489**	**107,364**
LUXURY			
929	2,158	980	1,353
98 Regency	9,615	3,082	3,511
Allante	480	61	108
Brougham	3,551	2,946	2,634
Chrysler TC by Maserati	350	12	61
Continental	26,007	13,412	105,494
Corvette	2,324	300	1,286
Cressida	1,183	764	479
DeVille/Fleetwood	50,631	26,788	34,523
Eldorado	3,623	1,108	1,696
Electra	—	6,136	—
Imperial	1,768	1,279	3,408
Lexus (all models)	10,922	4,780	5,250
Mark VII	6,071	2,242	1,241
Riviera	1,491	234	1,311
Scorpio/XR4Ti	—	129	—
Seville	19,218	7,074	8,027
Toronado	1,840	824	1,008
Town Car	62,959	25,362	39.993
Total Luxury	**204,191**	**97,513**	**211,383**
SPORTS/SPECIALTY			
240 SX	6,636	3,319	2,721
300 ZX	5,630	2,604	1,762
Beretta	9,139	7,538	4,172
Cabriolet	627	371	178
Camaro	2,726	531	1,748
Celica	7,339	3,646	2,742
Corrado	—	161	479
Cougar	9,523	7,047	8,386
Cutlass Supreme	25,759	12,736	20,506
Daytona	2,306	939	585
Firebird	1,622	224	1,060
Grand Prix	26,762	11,907	18,279
Laser/Talon	3,333	503	2,427
Miata	2,306	1,089	1,138
MR2	1,022	171	540
Mustang	17,985	10,545	18,636
Probe	23,587	9,151	9,292
Pulsar NX	407	235	14
Reatta	2,626	1,757	479
Regal	9,859	2,045	15,124
RX-7	991	432	345
Scoupe	—	—	27
Stealth	—	—	375
Storm/Spectrum	1,957	430	1,542
Supra	875	587	213
Total Sports Specialty	**163.017**	**77.968**	**112.770**
Total Fleet	**1.920.701**	**971.768**	**1.302.722**

Midyear Truck Registrations

This chart lists fleet registration figures for the first six months of the 1991-model year for trucks, sport/utility vehicles and vans. Registration figures for the first six months of the 1990-model year are listed for comparison.

Manufacturer Model	1990 1st 6 mo MYTD	1991 1st 6 mo MYTD
CLASS 1-3		
American Isuzu Pickups	3,090	1,808
Chevrolet/GMC		
S-10/S-15	N/A	7,058
C/K1500	N/A	17,684
C/K2500	N/A	7,797
C/K3500	N/A	4,703
Dodge/Jeep		
Ram 50/D-Series	N/A	5,235
Dakota	N/A	3,105
Comanche	N/A	124
Ford Ranger	9,625	9,655
Ford F-Series	31,121	34,371
Isuzu Truck NPR/W4*	1,795	1,757
Mazda B2200/B2600	1,464	1,672
Mitsubishi Pickups	47*	31*
Mitsubishi Fuso	N/A	N/A
Nissan Pickups	4,328	4,044
UD Trucks	N/A	N/A
Toyota Pickups	4,931	3,865
Total Class 1-3	**56,401[1]**	**102,909**
CLASS 4-5		
Hino All Class 4-5 models	N/A	N/A
Isuzu Truck NRR/W5*	312	404
Mitsubishi Fuso All Class 4-5 Models	N/A	N/A
UD Trucks All Models	N/A	N/A
Total Class 4-5	**312[1]**	**404**
SPORT/UTILITY		
American Isuzu Rodeo	N/A	41
American Isuzu Trooper	518	156
Chevrolet/GMC Blazer/Jimmy Models	N/A	11,293
Dodge/Jeep		
Ramcharger	N/A	422
Jeep XJ/Cherokee/XJ Wagon	N/A	5,311
Jeep CJ/Wrangler	N/A	986
Ford Bronco	2,028	4,492
Ford Explorer	15,414	3,811
Mitsubishi Montero	17*	17*
Nissan Pathfinder	1,616	2,496
Toyota 4Runner	3,699	1,877
Toyota Landcruiser	141	267
Total Sport/Utility	**23,433[1]**	**31,128**
VANS		
American Isuzu		
Chevrolet/GMC		
Lumina APV	N/A	10,218
Astro/Safari	N/A	16,823
G-Series Vans	N/A	8,247
Dodge Caravan/Voyager	N/A	29,862
Dodge B/PB Series	N/A	7,872
Ford Aerostar	27,900	20,080
Ford Econoline	21,583	27,920
Mazda MPV	2,416	3,053
Mitsubishi Vans (passenger & cargo)	32*	N/A*
Toyota Previa	247	2,447
Volkswagen Vanagon	N/A	120
Total Vans	**52,178[1]**	**126,642**

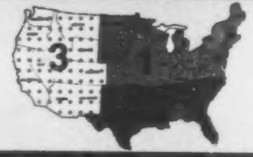
[1] Registration figures for some manufacturer models not available. Total is not industry wide.

* W4 and W5 are Chevy/GMC badged vehicles.

* Mitsubishi numbers based on sales figures.

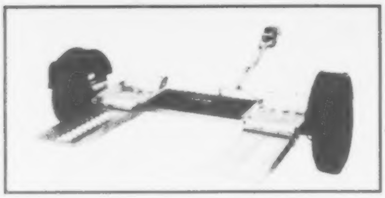
USED-CAR PRICES

The following are average used-car prices for the period ending August 10,1991. Prices are based on wholesale activity at major dealers across the country. They are divided into three zones as indicated on the accompanying map. These averages are calculated electronically. They are based on clean cars only. Proper allowance should be made for upgrading sharp cars and proper deduction taken for fair cars. Automatic transmissions have been included in the averages of all models. This information is published in *Automotive Fleet* by special permission of *Automotive Market Report*.



Model	AVERAGE AUCTION PRICE Zone 1	Zone 2	Zone 3
89 BUICK SKYHAWK			
Coupe	5,623	5,678	5,506
Sedan	5,700	5,758	5,566
88 BUICK SKYHAWK			
Coupe	4,557	4,606	4,466
Sedan	4,622	4,668	4,530
90 BUICK SKYLARK			
Cust Sedan	7,810	7,887	7,655
89 BUICK SKYLARK			
Cust Sedan	6,589	6,656	6,459
90 BUICK CENTURY			
Cust Sedan	8,394	8,477	8,224
89 BUICK CENTURY			
Cust Sedan	6,579	6,645	6,447
90 BUICK LESABRE			
Cust Sedan	10,775	10,884	10,562
89 BUICK LESABRE			
Cust Sedan	8,394	8,476	8,223
90 CADILLAC DEVILLE			
Coupe	17,598	17,772	17,246
Sedan	17,775	17,955	17,421
89 CADILLAC DEVILLE			
Coupe	14,646	14,791	14,355
Sedan	14,806	14,957	14,511
90 CADILLAC SEVILLE			
Sedan	18,101	18,281	17,738
89 CADILLAC SEVILLE			
Sedan	14,955	15,105	14,655
90 CHEVY BERETTA			
Coupe	7,838	7,917	7,681
89 CHEVY BERETTA			
Coupe	6,621	6,688	6,487
90 CHEVY CORSICA			
Hatchback 5 Dr.	7,539	7,617	7,391
89 CHEVY CORSICA			
Hatchback 4 Dr	6,221	6,284	6,096
90 CHEVY CAVALIER			
Sedan	6,346	6,412	6,221
89 CHEVY CAVALIER			
Sedan	5,188	5,239	5,084
89 CHEVY CELEBRITY			
Sedan	5,964	6,024	5,843
88 CHEVY CELEBRITY			
Sedan	4,751	4,799	4,656
90 CHEVY CAPRICE			
Sedan	8,519	8,605	8,350
89 CHEVY CAPRICE			
Sedan	6,684	6,753	6,550
90 CHRYSLER LE BARON			
Sedan	9,507	9,602	9,318
89 CHRYSLER LE BARON			
Highline Sedan	6,373	6,435	6,241
90 CHRYSLER NEW YORKER			
Salon Sedan	11,277	11,391	11,053
89 CHRYSLER NEW YORKER			
Sedan	9,631	9,725	9,438
89 CHRYSLER FIFTH AVENUE			
Sedan	9,733	9,824	9,534
88 CHRYSLER FIFTH AVENUE			
Sedan	7,559	7,834	7,407
89 DODGE ARIES AMERICA			
Sedan	4,739	4,7[illegible]5	4,642
88 DODGE ARIES AMERICA			
Sedan	3,714	3,751	3,640
90 DODGE SHADOW			
Liftbk 5 Dr	6,501	6,568	6,374
89 DODGE SHADOW			
Liftbk 5 Dr	5,347	5,398	5,242
90 DODGE DYNASTY			
Sedan	8,684	8,772	8,512
90 FORD ESCORT			
Htchbk 4 Dr LX	5,631	5,689	5,518
89 FORD ESCORT			
Htchbk 4 Dr LX	4,479	4,523	4,390
90 FORD MUSTANG			
LX-4 Coupe	7,455	7,532	7,308
90 FORD TEMPO			
GL Sedan 4 Dr	6,640	6,708	6,506
89 FORD TEMPO			
GL Sedan 4 Dr	5,302	5,356	5,195
90 FORD TAURUS			
GL Sedan 4 Dr	9,195	9,288	9,013
89 FORD TAURUS			
GL Sedan 4 Dr	6,914	6,984	6,772
90 FORD CROWN VICTORIA			
Sedan	10,704	10,812	10,489
89 FORD CROWN VICTORIA			
Sedan	8,771	8,858	8,597
90 THUNDERBIRD			
Coupe	9,631	9,726	9,438
89 THUNDERBIRD			
Coupe	8,128	8,209	7,966
90 LINCOLN			
Town Car Sedan	18,000	18,179	17,641
Mark VII LSC Coupe	17,109	17,279	16,766
Continental Sedan	16,461	16,626	16,131
89 LINCOLN			
Town Car Sedan	13,309	13,444	13,043
Mark VII LSC Coupe	14,273	14,416	13,990
Continental Sedan	14,206	14,349	13,923
90 MAZDA 626			
LX Sedan 4 Dr	10,229	10,331	10,127
90 MERCURY COUGAR			
LS Coupe	10,254	10,355	10,045
89 MERCURY COUGAR			
LS Coupe	8,694	8,780	8,520
90 MERCURY TOPAZ			
GS Sedan 4 Dr	6,801	6,871	6,669
89 MERCURY TOPAZ			
GS Sedan 4 Dr	5,444	5,498	5,336
90 MERCURY SABLE			
GS Sedan 4 Dr	9,284	9,375	9,096
89 MERCURY SABLE			
GS Sedan 4 Dr	6,968	7,037	6,826
90 MERCURY GRAND MARQUIS			
GS Sedan	11,158	11,269	10,937
89 MERCURY GRAND MARQUIS			
GS Sedan	9,306	9,400	9,121
90 MITSUBISHI MIRAGE			
Sedan 4 Dr	6,240	6,302	6,178
89 MITSUBISHI MIRAGE			
Sedan 4 Dr	4,720	4,767	4,674
90 NISSAN MAXIMA			
SE Sedan	14,622	14,769	14,473
89 NISSAN MAXIMA			
SE Sedan	12,302	12,425	12.177
90 NISSAN SENTRA			
Sedan 2 Dr	5,565	5,620	5,508
89 NISSAN SENTRA			
Sedan 2 Dr	4,262	4,303	4,218
90 NISSAN STANZA			
XE Sedan	9,153	9,243	9,061
89 NISSAN STANZA			
E Ntch 4 Dr	7,222	7,293	7,148
90 OLDS CIERA			
Coupe	8,460	8,545	8,290
Sedan	8,103	8,186	7,942
89 OLDS CIERA			
Coupe	6,505	6,572	6,378
Sedan	6,579	6,645	6,447
90 OLDS CALAIS			
Sedan	6,942	7,011	6,804
89 OLDS CALAIS			
Sedan	6,040	6,100	5,920
90 OLDS CUTLASS SUPREME			
Coupe	9,370	9,463	9,182
89 OLDS CUTLASS SUPREME			
Coupe	7,507	7,585	7,359
90 OLDS 98 REGENCY			
Sedan	13,530	13,667	13,260
89 OLDS 98 REGENCY			
Sedan	10,387	10,491	10,177
89 PLYMOUTH RELIANT			
Sedan	4,714	4,762	4,622
88 PLYMOUTH RELIANT			
Sedan	3,714	3,750	3,642
90 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	6,482	6,548	6,355
89 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	5,347	5,398	5,242
89 PLYMOUTH GRAN FURY			
Salon Sedan	4,898	4,949	4,802
88 PLYMOUTH GRAN FURY			
Salon Sedan	3,868	3,907	3,795
90 ACCLAIM			
Sedan	7,359	7,433	7,212
90 PONTIAC SUNBIRD			
LE Sedan	6,640	6,704	6,504
SE 5Coupe	6,860	6,929	6,720
89 PONTIAC SUNBIRD			
LE Sedan	5,525	5,580	5,414
SE Coupe	5,673	5,730	5,561
90 PONTIAC 6000			
LE Sedan	8,317	8,402	8,148
89 PONTIAC 6000			
Sedan	6,193	6,252	6,068
90 PONTIAC GRAND AM			
LE Sedan	7,778	7,867	7,633
89 PONTIAC GRAND AM			
LE Sedan	6,490	6,556	6,362
90 PONTIAC BONNEVILLE			
LE Sedan	10,843	10,95[illegible]	10,628
89 PONTIAC BONNEVILLE			
LE Sedan	8,314	8,396	8,149
90 PONTIAC GRAND PRIX			
Coupe	9,497	9,591	9,305
89 PONTIAC GRAND PRIX			
Coupe	7,622	7,698	7,468
90 SUBARU LEGACY			
Sedan 4 Dr Deluxe	8,428	8,509	8,341
90 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	9,820	9.919	9,723
89 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	8,081	8,161	6,001
90 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	7,481	7,556	7,408
89 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	6,287	6,349	6,224
90 TOYOTA CRESSIDA			
Lux Sedan	15,598	15,754	15,443
89 TOYOTA CRESSIDA			
Lux Sedan	12,898	13,028	12,769
90 VOLKSWAGEN JETTA			
Sedan 4 Dr	8,332	8,416	8,247
89 VOLKSWAGEN JETTA			
Sedan 4 Dr	6,890	6,960	6,821
90 VOLVO			
240 DL Sedan	12,942	13,072	12,815
89 VOLVO			
240 DL Sedan	10,896	11,005	10,787

PRODUCTS/SERVICES



a built-in suspension to minimize bouncing. The dolly bed tilts and locks into place when loading. A swivel bed platform pivots on polyethylene pads for smooth cornering. *Automatic Equipment Mfg. Co.*

Circle 213 on Inquiry Card

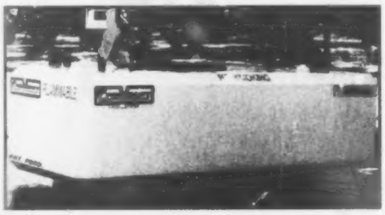
MOLDING & STRIPE REMOVAL KIT removes molding adhesive, decals, graphics, double-faced tape, and stripping tape from body panels without damaging the finish. The kit by Mac Tools includes a geared drill/die grinder, 3M Scotch-Brite disc, and roloc holder. *Mac Tools, Inc.*

Circle 214 on Inquiry Card

REPAIR MANUAL offers full coverage of 1991 domestic cars in two comprehensive volumes: Chrysler/Ford and General Motors. The Mitchell 1991 Annual Data manual includes service and repair procedures for air bags, engine performance, electrical wiring, clutches, drive axles, steering, wheel alignment, brakes, suspensions, as well as transmissions. *Mitchell International.*

Circle 215 on Inquiry Card

ABOVE GROUND FUEL TANK is a precast unit with sizes available up to 2,000 gallons. The Convault tank by Associated Concrete Products eliminates costly monitoring equipment, allowing visual inspection for leaks. *Associated Concrete Products.*



Circle 216 on Inquiry Card

AN AFTERMARKET OIL FILTER has a raised handle across the closed end for easy removal. Torque is applied perpendicular to the handle of the Sure Grip Filter and can be removed even with soiled hands. *Sure Grip Filter.*

SURE GRIP
OIL FILTER

Circle 217 on Inquiry Card

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V.P., VEHICLE LEASING, SALES & MARKETING

Midsize vehicle fleet management and leasing company seeks person with vehicle leasing industry experience to manage all sales and marketing activities. Compensation open. Send complete resume with compensation history to: **President, Fleetmark, Inc. 6060 Poplar Ave., Suite 442, Memphis, TN 38119-3902.** No phone calls.

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GAS PRICES

UNLEADED GAS
Cost Per Gallon

City	Full-Serve	Self-Serve
Juneau, AK	175.9¢	152.9¢
Birmingham, AL	129.9	106.9
Tucson, AZ	125.1	95.2
Inglewood, CA	149.9	98.9
Washington, D.C.	150.9	112.6
Maui, HI	203.9	152.6
Chicago, IL	164.1	126.7
Louisville, KY	136.9	108.6
Worchester, MA	136.9	122.9
Minneapolis, MN	162.0	120.0
Billings, MT	140.2	115.9
Asheville, NC	165.9	114.2
Niagara Falls, NY	130.9	122.9
Oil City, PA	115.4	107.4

The average U.S. full-serve gasoline price for the month of August was 137.9 cents per gallon.
The average U.S. self-serve gasoline price for the month of August was 115.7 cents per gallon.
Survey conducted during the first five working days of August 1991.
Data supplied by Runzheimer International, Runzheimer Park, Rochester, WI.

EDITORIAL

I would I could stand on a busy corner, hat in hand, and beg people to throw me all their wasted hours.
—Bernard Berenson

Ordinary people merely think how they shall spend their time; a man of talent tries to use it.
—Arthur Schopenhauer

What can be done at any time is never done at all.
—English proverb

Time Is Of The Essence

A car and a salesperson just go together. In the corporate world the two are virtually inseparable. Salespeople and their vehicles are like Ray Charles and his piano, Arnie Palmer and a golf club, or a coach with a cigar; they might even be called the "odd couple."

So it is always an important time when intelligent executive management takes stock of the fleet budget. In this period of lingering economic recession, management must look to either cut expense or to increase revenue. After cutting staff, offering early retirement plans, restricted use of the fax and Xerox machines and close outs of the club memberships, the corporate steering committee turns to sales. Increased sales, while holding costs, can solve many of the current financial problems; it's management 101.

Why is the vehicle that important? The adjoining chart spells it out in clear language. Corporate America's sales and tech service fleet is out in the trenches with our best known sales tool: the vehicle. These drivers cost the company over $200 for every call that is made, on average. These drivers are spending 20 percent of their working hours getting to or going from productive calls. They are racking up more than 27,000 miles each year in the sales tool provided to them. Cahner's Research's latest per call cost figure is now $259; and Dartnell researched the business-time chart. It's solid documentation.

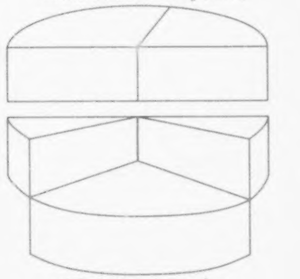
So, why a bouquet for the fleet manager? The fundamental beginning of any corporate relationship is between the sales or service manager and the salesperson; except that we must add the fleet manager to that equation at a similar level because of the "sales tool" (the vehicle). Who is the liaison with the driver on his most important sales tool that permits him or her to get from home to the office, to the call, to anywhere that the company deems necessary? Who prudently selects the proper vehicle and options? Who makes safety (and exposed employee liability or lost work time) a top ingredient in the selection? Who makes certain that the driver operates the sales tool with the least downtime for maximum productivity? Who determines the most efficient policies to maintain and ultimately gain the best resale value after the car is turned in? The fleet manager is a hybrid of Father Christmas and Ebenezer Scrooge to the drivers and operates as the CFO of the collective fleet within the company.

How Salespeople Spend Their Time

Breakdown of an average 47-hour workweek

Selling face-to-face:
14.1 hours, or 30% of time

Selling over the phone :
9.4hours, or 20% of time



Administrative tasks:
6.6 hours, or 14% of time

Service calls:
6.1 hours, or 13% of time

Waiting/traveling:
10.8 hours, or 23% of time

Source: "Twenty-sixth Survey of Sales Force Compensation," a survey of U.S. companies, nearly three quarters of which had sales less than $50 million. The Dartnell Corp. Chicago, IL, 1990

The financial aspects of running the vehicle fleet are enormous and significant disparities exist between the effectiveness of individual company fleet managers. Executive management needs to recognize the significant role the fleet manager plays in a corporate structure. The fleet manager function equates with that of the other senior managers inside the company. If it doesn't, the company's not getting its money's worth. It's *time* to evaluate!

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1992s Debut

Cadillac Seville

Cadillac Eldorado

Cost Cutting
by Computer:

Odometer Fraud Exposed!

Secret of Good Truck Management

Managing Outsourcing Effectively

automotive
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CAR AND LIGHT TRUCK FLEET AND LEASING MANAGEMENT MAGAZINE

October 1991
VOL. 30, NO. 12

Influencing the management of
5,072,000 cars and 2,209,000 light trucks
and vans in business, leasing, rental,
utility, government, police, and taxi fleets.

***Page 22**—The 1992 Ford Taurus has received an all-new interior, standard driver-side air bag, and an optional passenger-side air bag.*

***Page 106**—Mosler Inc.'s light-duty trucks have reduced the company's need for larger units.*

1992s Debut

***On the Cover**—The Cadillac Seville (top) and Eldorado (bottom) have been completely redesigned. Pictured are Peter Gerosa (left), general sales and service manager, and Dave John (right), director of fleet and leasing. See page 22.*

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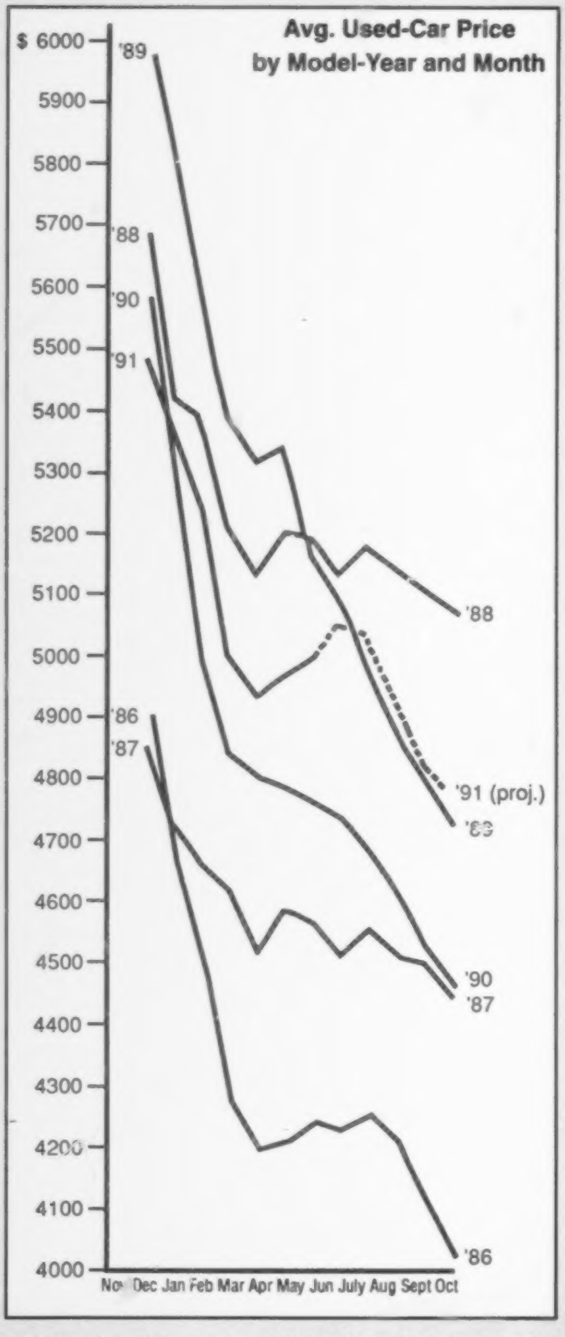
Used-Car Price History

Presented are used-car prices as a percent of new-car cost and an analysis of the resale market from 1986 to 1992.

Model Year	New-Car Avg. Cost	Used-Car Avg. Value	Percent Relation	
1992 (proj.)	$ 11,900	$ 5,235	41%	As the economy begins to improve during the new model-year, car sales will increase. Trade-ins will create an abundant supply of used vehicles and subsequent lower values. However, attractive accessories will make a vehicle with high mileage saleable.
1991	$ 11,658	$ 4,998	42.9%	Flat new-car pricing suppressed used-car values. The Middle East conflict raised doubts in consumers early in the model-year which further depressed values. Success in the Persian Gulf spurred consumer confidence, but generally poor economic conditions continued to stall the sale of new vehicles. These two countervailing forces did increase the demand for used vehicles causing the values to rebound.
1990	$ 11.595	$ 4,920	42.4%	Price resistance to high mileage vehicles continued to escalate. Manufacturers' pricing and rebate programs kept used-car values generally low. However, vehicles with additional accessories and moderate mileage sold well. The volume of used-rental vehicles for sale helped depress the early market of used cars. Slow new-car sales and the lack of trade-ins helped spur the spring rebound.
1989	$ 10,940	$ 5,401	49.3%	The lack of significant new-car price adjustment has had a flattering effect on used-car market values. Well-equipped cars with lower mileage were able to stand above the market.
1988	$ 10,378	$ 5,106	49.2%	Even though the factors that strangled the market for the past three years were still present, the market did show some strength toward year end.
1987	$ 9,815	$ 4,588	46.7%	The used-car market began to show some modest strength with the weakening of new-car sales. However, continued below-market factory new-car financing and federal odometer law enforcement continued to impact late model, high mileage used-vehicle values.
1986	$ 9,657	$ 4,575	47.4%	Four factors—modest new-car price increases, factory rebates and finance incentives, extended new-car financing, and federal odometer law enforcement—had a negative impact on the used-car market.



Avg. Used-Car Price by Model-Year and Month

The graph represents the weighted average price of vehicles sold during the model year shown. The used-vehicle prices utilized to develop this graph are based on AMR wholesale clean condition values of a composite of two-year-old cars with normal fleet equipment and 50,000 miles (10 percent full-size, 60 percent intermediate-size, and 30 percent compact or mini-size.)

Chart courtesy of Enterprise. *Copyright 1991.*

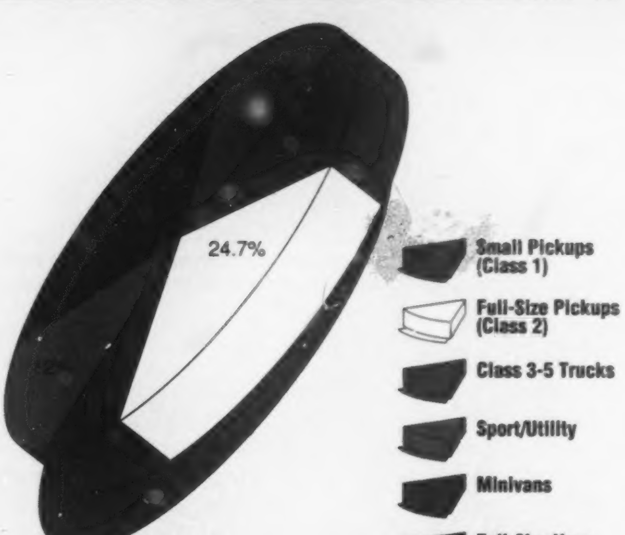
The Secret to Effective Fleet Truck Management

Managers of smaller fleets can learn from truck procedures and practices used by larger fleets. In addition, passenger car expertise can assist managers assuming light-truck fleet management for the first time.

How does managing a fleet of Class 1-5 trucks, or a mixed fleet of cars and trucks, compare with managing a 100 percent passenger car fleet? There isn't one simple answer. Companies have changing truck requirements and applications over time. Truck specification and truck equipment available to fill these needs also change constantly. With changing regulations for how trucks may or may not be used, along with frequent fluctuations in truck economics (such as fuel prices, used vehicle values, and interest rates), it should be evident that the best answer for any fleet operating trucks is to have a knowledgeable truck professional close at hand.

Fortunately, the essentials of managing a truck fleet aren't too hard to visualize—the skill of execution is what makes the difference. Fleet passenger car experience is a good start.

1991-Model Year Midyear Fleet Truck Registrations



This chart illustrates the current composition of the fleet truck market. Knowing which types of trucks are being utilized by other fleets can help a truck fleet manager make effective decisions and discern industry trends.

Trucks are Business Tools

Look upon trucks as business tools. Like any tool, a truck must be chosen properly for the job, given prescribed maintenance, and replaced when it no longer earns its keep. Although the lifetime of an average truck is about 14 years, seldom do fleets find it economically attractive to keep trucks that long. Trucks lose dependability as time and mileage take their toll, and at some point should be replaced before they no longer economically fulfill their mission.

The firm that prides itself on providing prompt delivery or prompt appearance of a service vehicle needs more than dependable trucks with competent drivers; these vehicles must be well directed. The key to service with firms such as Federal Express is not how fast their drivers can weave through traffic, but knowing where they are and when they will arrive where they are going. Today's sophisticated computer and radio equipment makes it possible to assure overnight service anywhere.

Some fleets prefer to use smaller vehicles to make service calls, and to place more reliance on intelligent dispatching. Computer analysis can reduce on-board inventories of parts and tools, make more effective use of service technicians' time, and assure more constant loading of each truck.

Trucks as a Marketing Tool

Your company trucks can and do make statements about what kind of firm you are, what you do, how to reach you, and how important you seem to be in the market. Some companies treat the entire truck as a rolling billboard, with supergraphics all around. Other firms prefer to understate their presence. Both approaches have their adherents —compare the highly visible graphics used by Federal Express with the more conservative identification on United Parcel Service trucks. Often a firm will prefer not to identify its company cars, but have a full identification program for its trucks. As a truck fleet manager, you should have inputs to the decision, particularly as an ID program relates to cost. Although truck makers often will paint special colors on fleet orders, the trend is in the direction of applying paint or identification decals to standard colors, notably white. Decals simplify damage repairs, can usually be applied by less skilled personnel, and have more uniformity. Importantly, when you're through with your trucks, you don't want to have your ID showing on whatever the next owner might use them for.

A word about what your competitors are doing. Your firm doesn't operate in a vacuum—it competes with others. Be on the lookout for your competitors trying to snatch market share from you by way of their truck fleet. High visibility graphics, distinctive trim, and other extra cost items may not look good on computer printouts, but they might be a deliberate effort to upstage you with your customers. Small firms, and owner-operators in particular, often try to show up plain Jane "company fleets" in this manner.

Right Truck, Wrong Location

Some other issues also affect proper truck selection. For instance, what's right for Miami in terms of truck selection probably needs rethinking for Minneapolis. Trucks banging around the loading docks need more rub rails and grille guards than a rural route truck. Arizona trucks need a lot of cooling capacity. Grade retarders aren't much help in midtown Manhattan, but extend brake life in areas with long downgrades. Truck fleet managers should know these things, regardless of where their home office may be.

State and municipal jurisdictions enter the picture in a big way. You need to learn about license plate reciprocity if you operate across state lines. For more than a decade California has mandated emission controls more stringent than other states, to the point where some engine/transmission combinations offered in other states are not available to

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California operators. More regulations are coming, so look ahead, and plan ahead.

How Much Management is Needed

The essence of good management is knowing when to say "Yes", as well as when to say "No". It wasn't too many years ago that intercity trucking was a weak competitor to the extensive network of railroads in this country. But we now know that years of railroad managements saying "No" to needed maintenance and improvements, and the public insisting "Yes" for an Interstate Highway System have turned this competitive situation around. Fortunately, truck makers and truck fleet operators have also said "Yes" at the right times, and fleet productivity has continued to climb.

A truck fleet manager has a research and development hat of sorts to wear—he or she can't simply mandate use of smaller trucks in the same way a car fleet manager can downsize a firm's cars to meet budget constraints. Tom Pfingst, Chevrolet Division fleet operations man-

Conveying the desired professional image to its customers and to the public has long been a goal of fleet managers. From the beginning, sign painters have lettered, numbered, and decorated trucks to the point of being works of art. Truck makers, too, have catered to fleet desires for company colors, a privilege not extended to individual truck buyers.

In recent years decals have been developed that will last the life of paint, from standard numbers and letters for individual application, to intricate designs covering large areas. Up to quite recently such decals were only available to large fleets, but as described in *Automotive Fleet* (January 1991) Sun Art Decals, of Cleveland OH has set out to serve the needs of smaller fleets as well. The key to smaller quantity production is the use of CAD/CAM systems that digitize the design on a computer, which can then generate that design in any size, in any quantity, and at any time. Thus, a company wishing to update all its trucks with a new phone number can refer to the original design, and make replacement decals as needed.

Decals can usually be removed by using a heat gun and solvents; should that fail, a sander will finish the job. Installation and removal does not require special skills, although surface preparation is important to control in any installation.

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ager, stresses that today's most insightful fleet managers are rethinking their truck utilization practices, to the point of asking manufacturers to develop trucks that don't now exist. Some prototypes have been built, and are being tried out in actual fleet operations. It's a win-win situation, in which all fleets will ultimately benefit from pioneering efforts of some very talented fleet managers.

Some things a truck fleet manager has to consider apply generally; others are specific to the firm. For example, all managers have to deal with departmental budgeting, fleet policy execution (and hopefully development), preventive maintenance, garaging, fueling, washing, identification application, recordkeeping, replacement criteria, and so forth. Within each firm, the fleet manager must conform to established accounting procedures, personnel policies, specific policies regarding in-house or outside servicing, kinds of tasks each vehicle will perform, and more. Truck fleet managers generally spend less of their time than car counterparts working on accommodating comfort and convenience requests, and more of their time making sure that the right body configuration, springs, tires, engines, gear ratios, and special work equipment are selected, and that all keep in good working order.

As with passenger cars, there must be a plan for truck replacement, and decisions for disposal methods. Selector lists can simplify the task of choosing cars, but truck fleet managers should be more open to consider different makes. Wheelbase and engine size of fleet passenger cars are sometimes determined by rank of the user; for trucks, wheelbase, and power are determined by the job to be done.

A word of advice to those contemplating in-house servicing: large fleets may keep an inventory of spare parts, and perform centralized servicing in off-hours to keep vehicles on the road. Smaller fleets may wish to do the same, but make sure you consider all the hidden costs of running your own service operation. Today's trucks have more electronics, necessitating investment in special test equipment. Full-time employees are inevitably covered by the same company benefit programs as other workers. You need supervision to run maintenance shops—you don't want to leave ex-

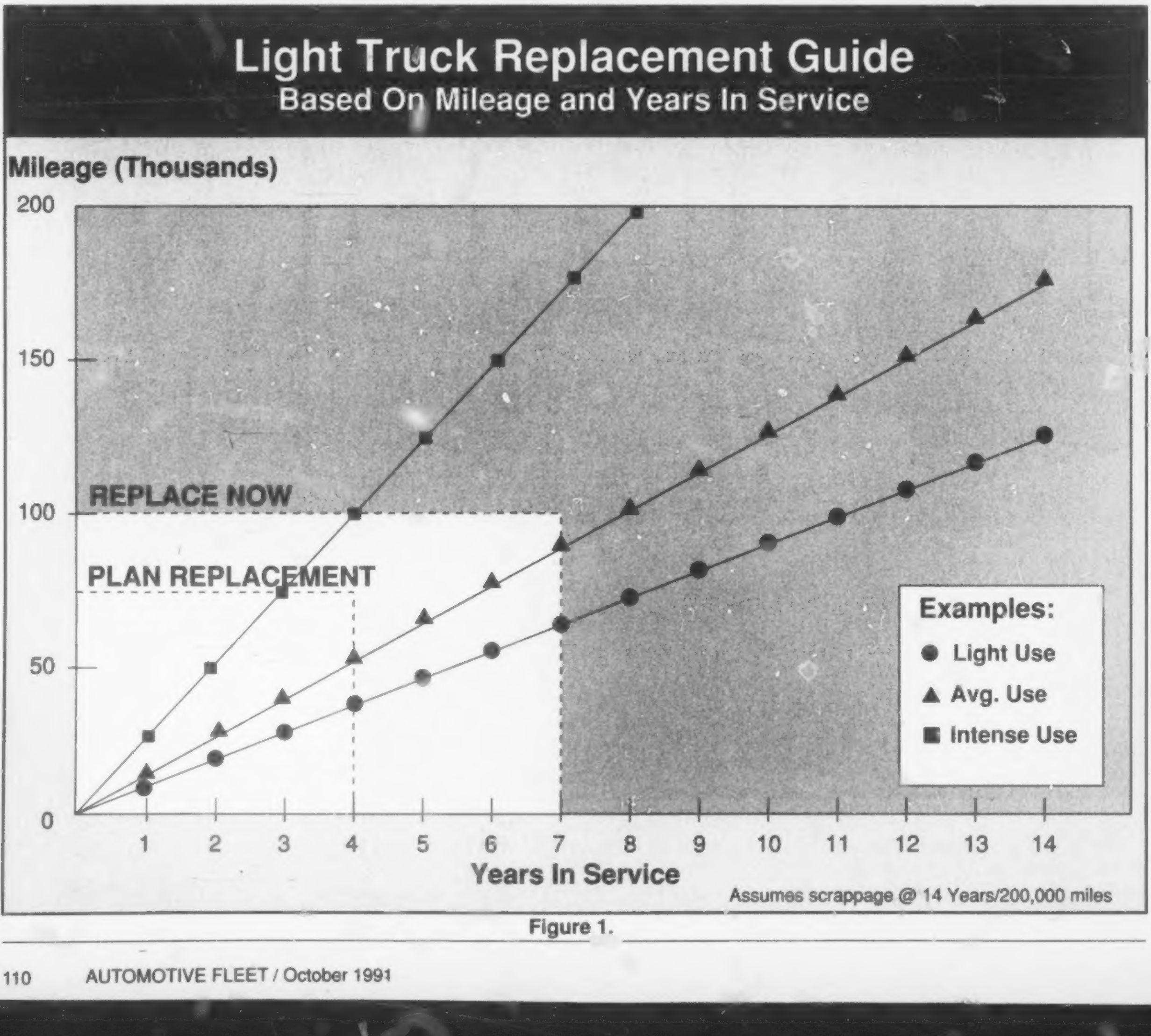

Figure 1.

Fleet managers can help their firms in many ways, as the experience of Mosler Inc. in Hamilton, OH, illustrates. Mosler's business requires some 140 passenger cars and 950 trucks to sell and service its safes and security systems. Glenn Dinkheller, manager fleet and facilities, was able to refine fleet specifications to allow use of smaller trucks. Larger trucks are still used to deliver heavy safes, which require substantial moving dollies and lifting apparatus, but service needs are now largely handled by compact, 1/2, and 3/4-ton pickups and vans.

Vehicles are spec'ed to handle worst case loads, and in practice carry about 80 percent of their load capacity at all times. Such loading permits fine tuning of vehicles for markets where six-cylinder engines are used except for trailering applications and hilly areas, when V-8's get the call.

Trucks and vans are amortized at 2 1/4 percent per month, so after three years when about 80 percent is written off, and when vehicles hit 75,000 miles, Dinkheller starts looking closely at replacement before major engine work is needed. In Mosler's operation, new light-duty trucks are routed to an upfitter for shelving/utility body additions, as well as for decal application. With today's more corrosion resistant materials, the only trucks now receiving undercoating are those for Hawaii, where the combination of humid salt air and low mileage lengthen Mosler's time of ownership.

These light-duty trucks have reduced Mosler Inc.'s dependance on larger units.

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(Continued from page110.)

pensive parts untended—they have been known to sprout wings. Some fleets are rethinking their use of selling dealers for service, despite past misgivings. As warranties get longer, it becomes more necessary to show evidence to selling dealers that proper maintenance was always performed on a failed component.

Replacement Cycle Analyses

A truck fleet manager must develop criteria for optimizing replacement cycles of different types of trucks in the fleet. Group 1-5 trucks are the work horses of many fleets, but similar trucks may be used quite differently. For example, where trucks drive to the job, stay parked for long periods, and have low annual mileage, they might retain acceptable dependability for seven to eight years. Other group 1-5 trucks might run up high mileage and may have to be rebuilt after two to three years, and replaced in five to six years. These applications are where diesel power has made strong inroads, and where the fleet manager needs to think of long-term cost, not

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just initial price.

Useful service life is a function of job application more than anything else. It is important to keep the kind of records that can identify the increasing costs of maintenance as each truck adds mileage, and how much down time is incurred.

A simplified light-duty replacement guide is shown in Figure 1. This example presumes a light truck should be reviewed for replacement at five years, or 75,000 miles—whichever occurs first. It further presumes the fleet user is taking unnecessary risks when relying on vehicles with over seven years or 100,000 miles. These presumptions could easily be modified to fit your own experience, of course. The example also illustrates expected lifetime service to be 14 years or 200,000 miles, which is about right for all trucks, including those in personal usage.

On the graph are plotted three truck histories—low, average, and high mileage applications. One can trace when each truck enters the "Plan Replacement" zone, and at what point each truck would be replaced without further delay.

Other lines could also be added to this graphic presentation to show terms of manufacturer's bumper-to-bumper warranties, emission system warranties, or applicable depreciation schedules. Also, several computer programs have been prepared by major leasing companies to assist in planning replacement cycles.

Few businesses are immune to business cycle ups and downs; fleet managers have to learn to adjust replacement plans accordingly. Tight belt operations are the norm in industry today, and sometimes shortcuts creep in. Cannibalization of unused trucks may get you through temporarily in a recession, but be prepared for the rush when business picks up—you may have trouble explaining why so many trucks that ran well last year are cripples today. The least you can do is keep good records of where your fleet stands at all times, and what to do when your firm's trucking needs increase.

In addition to everything else, there are times when accidents happen, and a decision may have to be made regarding early replacement. Insurance companies sometimes do it for you, when they refuse to pay for collision repairs in excess of policy limits. But catastrophes don't always involve covered risks. Sometimes a vehicle suffers a major breakdown outside of warranty provisions. Drivers sometimes also do strange things when backing up, or vehicles may be vandalized. Whatever the cause, you need a policy to guide your next step to keep your fleet functional, and how much downtime you can afford if major repairs are undertaken. You are also advised to have management support for how many backup vehicles you have parked against the fence to fill in for trucks undergoing repair, for seasonal needs, or simply to handle a projected increase in business activity.

Buy vs. Lease Considerations

Leasing has generally been used to fund passenger cars rather than trucks. Perhaps the biggest reason for this lies in the salability of used units returned. Passenger car users buy standard vehicles, use them for about three years, and replace with more standard vehicles. Cars used only for transporting people are in demand as used cars.

Although used personally-owned light-duty trucks generally command high resale values at auctions, used fleet light-duty trucks with a lot of specialized equipment do not have a wide market. Fleet trucks therefore are used by their lessee or company owner for somewhat longer periods than are typical fleet passenger cars. In the past, cargo vans, pickups, and other Class 1-5 trucks used by businesses generally were owned, but the percentage that are leased has grown considerably over the past 10 years. A strong attraction of leasing is that it frees user capital for use in other areas of the business. Of course, there is a cost associated with leasing, but there is an advantage to expand and contract fleets without having to go to capital markets, or to tap into your firm's cash flow earnings. There are many ways to write a lease: length of the contract, full-service or financing only, open- or closed-ended are but a few of the options available. Just be sure that if you need to add a lot of special equipment, the lessor is agreeable to accommodating your needs.

Some fleets prefer to own a core group of trucks, and provide for seasonal peaks by renting additional units as needed. This has its advantages for retailers making deliveries in the Christmas season, but is offset to some degree by absence of retailer identification on rental trucks. AF

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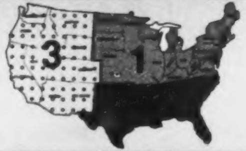
USED-CAR PRICES

The following are average used-car prices for the period ending September 10,1991. Prices are based on wholesale activity at major dealers across the country. They are divided into three zones as indicated on the accompanying map. These averages are calculated electronically. They are based on clean cars only. Proper allowance should be made for upgrading sharp cars and proper deduction taken for fair cars. Automatic transmissions have been included in the averages of all models. This information is published in *Automotive Fleet* by special permission of *Automotive Market Report*.



	AVERAGE AUCTION PRICE		
Model	**Zone 1**	**Zone 2**	**Zone 3**
89 BUICK SKYHAWK			
Coupe	5,623	5,678	5,506
Sedan	5,700	5,758	5,586
88 BUICK SKYHAWK			
Coupe	4,557	4,606	4,466
Sedan	4,622	4,668	4,530
90 BUICK SKYLARK			
Cust Sedan	7,748	7,824	7,594
89 BUICK SKYLARK			
Cust Sedan	6,543	6,609	6,414
90 BUICK CENTURY			
Cust Sedan	8,394	8,477	8,224
89 BUICK CENTURY			
Cust Sedan	6,526	6,592	6,396
90 BUICK LESABRE			
Cust Sedan	10,721	10,830	10,509
89 BUICK LESABRE			
Cust Sedan	8,327	8,409	8,157
90 CADILLAC DEVILLE			
Coupe	17,422	17,595	17,074
Sedan	17,598	17,776	17,247
89 CADILLAC DEVILLE			
Coupe	14,543	14,688	14,255
Sedan	14,703	14,852	14,410
90 CADILLAC SEVILLE			
Sedan	18,010	18,190	17,649
89 CADILLAC SEVILLE			
Sedan	14,806	14,954	14,509
90 CHEVY BERETTA			
Coupe	7,814	7,893	7,658
89 CHEVY BERETTA			
Coupe	6,568	6,635	6,436
90 CHEVY CORSICA			
Hatchback 5 Dr.	7,516	7,594	7,369
89 CHEVY CORSICA			
Hatchback 4 Dr	6,171	6,234	6,048
90 CHEVY CAVALIER			
Sedan	6,270	6,336	6,147
89 CHEVY CAVALIER			
Sedan	5,146	5,197	5,044
89 CHEVY CELEBRITY			
Sedan	5,904	5,964	5,784
88 CHEVY CELEBRITY			
Sedan	4,703	4,751	4,610
90 CHEVY CAPRICE			
Sedan	8,451	8,536	8,283
89 CHEVY CAPRICE			
Sedan	6,631	6,699	6,497
90 CHRYSLER LE BARON			
Sedan	9,431	9,525	9,244
89 CHRYSLER LE BARON			
Highline Sedan	6,322	6,384	6,191
90 CHRYSLER NEW YORKER			
Salon Sedan	11,198	11,311	10,976
89 CHRYSLER NEW YORKER			
Sedan	9,516	9,608	9,325
89 CHRYSLER FIFTH AVENUE			
Sedan	9,655	9,746	9,457
88 CHRYSLER FIFTH AVENUE			
Sedan	7,513	7,588	7,363
89 DODGE ARIES AMERICA			
Sedan	4,706	4,752	4,609
88 DODGE ARIES AMERICA			
Sedan	3,695	3,732	3,622
90 DODGE SHADOW			
Liftbk 5 Dr	6,410	6,476	6,285
89 DODGE SHADOW			
Liftbk 5 Dr	5,299	5,349	5,195
90 DODGE DYNASTY			
Sedan	8,641	8,728	8,469
90 FORD ESCORT			
Htchbk 4 Dr LX	5,570	5,626	5,457
89 FORD ESCORT			
Htchbk 4 Dr LX	4,444	4,486	4,355
90 FORD MUSTANG			
LX-4 Coupe	7,411	7,486	7,264
90 FORD TEMPO			
GL Sedan 4 Dr	6,554	6,621	6,421
89 FORD TEMPO			
GL Sedan 4 Dr	5,249	5,302	5,143
90 FORD TAURUS			
GL Sedan 4 Dr	9,040	9,131	8,860
89 FORD TAURUS			
GL Sedan 4 Dr	6,852	6,921	6,711
90 FORD CROWN VICTORIA			
Sedan	10,576	10,682	10,364
89 FORD CROWN VICTORIA			
Sedan	8,638	8,770	8,511
90 THUNDERBIRD			
Coupe	9,487	9,581	9,297
89 THUNDERBIRD			
Coupe	8,006	8,087	7,847
90 LINCOLN			
Town Car Sedan	17,803	17,979	17,448
Mark VII LSC Coupe	16,921	17,090	16,582
Continental Sedan	16,379	16,543	16,050
89 LINCOLN			
Town Car Sedan	13,202	13,337	12,939
Mark VII LSC Coupe	14,159	14,301	13,878
Continental Sedan	14,093	14,234	13,811
90 MAZDA 626			
LX Sedan 4 Dr	10,198	10,300	10,097
90 MERCURY COUGAR			
LS Coupe	10,183	10,282	9,975
89 MERCURY COUGAR			
LS Coupe	8,625	8,710	8,452
90 MERCURY TOPAZ			
GS Sedan 4 Dr	6,712	6,782	6,582
89 MERCURY TOPAZ			
GS Sedan 4 Dr	5,390	5,444	5,282
90 MERCURY SABLE			
GS Sedan 4 Dr	9,136	9,225	8,951
89 MERCURY SABLE			
GS Sedan 4 Dr	6,905	6,974	6,765
90 MERCURY GRAND MARQUIS			
GS Sedan	11,024	11,135	10,806
89 MERCURY GRAND MARQUIS			
GS Sedan	9,194	9,288	9,011
90 MITSUBISHI MIRAGE			
Sedan 4 Dr	6,209	6,270	6,147
89 MITSUBISHI MIRAGE			
Sedan	4,696	4,743	4,651
90 NISSAN MAXIMA			
SE Sedan	14,520	14,666	14,372
89 NISSAN MAXIMA			
SE Sedan	12,216	12,338	12,092
90 NISSAN SENTRA			
Sedan 2 Dr	5,548	5,603	5,491
89 NISSAN SENTRA			
Sedan 2 Dr	4,262	4,303	4,218
90 NISSAN STANZA			
XE Sedan	9,153	9,243	9,061
89 NISSAN STANZA			
E Ntc 4 Dr	7,222	7,293	7,148
90 OLDS CIERA			
S Coupe	8,460	8,545	8,290
Sedan	8,103	8,186	7,942
89 OLDS CIERA			
Coupe	6,453	6,519	6,325
Sedan	6,526	6,592	6,396
90 OLDS CALAIS			
Sedan	6,886	6,955	6,750
89 OLDS CALAIS			
Sedan	5,998	6,058	5,878
90 OLDS CUTLASS SUPREME			
Coupe	9,305	9,397	9,118
89 OLDS CUTLASS SUPREME			
Coupe	7,484	7,562	7,337
90 OLDS 98 REGENCY			
Sedan	13,462	13,599	13,194
89 OLDS 98 REGENCY			
Sedan	10,356	10,460	10,146
89 PLYMOUTH RELIANT			
Sedan	4,681	4,729	4,590
88 PLYMOUTH RELIANT			
Sedan	3,695	3,731	3,624
90 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	6,392	6,456	6,267
89 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	5,299	5,349	5,195
89 PLYMOUTH GRAN FURY			
Salon Sedan	4,859	4,909	4,764
88 PLYMOUTH GRAN FURY			
Salon Sedan	3,837	3,875	3,765
90 ACCLAIM			
Sedan	7,278	7,351	7,133
90 PONTIAC SUNBIRD			
LE Sedan	6,600	6,664	6,465
SE Coupe	6,818	6,887	6,680
89 PONTIAC SUNBIRD			
LE Sedan	5,503	5,558	5,392
SE Coupe	5,651	5,708	5,539
90 PONTIAC 6000			
LE Sedan	8,275	8,360	8,108
89 PONTIAC 6000			
Sedan	6,131	6,189	6,008
90 PONTIAC GRAND AM			
LE Sedan	7,765	7,843	7,610
89 PONTIAC GRAND AM			
Sedan	6,477	6,543	6,349
90 PONTIAC BONNEVILLE			
LE Sedan	10,767	10,876	10,554
89 PONTIAC BONNEVILLE			
LE Sedan	8,264	8,346	8,101
90 PONTIAC GRAND PRIX			
Coupe	9,450	9,543	9,258
89 PONTIAC GRAND PRIX			
Coupe	7,584	7,660	7,431
90 SUBARU LEGACY			
Sedan 4Dr	8,428	8,509	8,341
90 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	9,820	9,919	9,723
89 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	8,105	8,185	8,025
90 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	7,481	7,556	7,408
89 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	6,300	6,362	6,236
90 TOYOTA CRESSIDA			
Lux Sedan	15,536	15,691	15,381
89 TOYOTA CRESSIDA			
Lux Sedan	12,898	13,028	12,769
90 VOLKSWAGEN JETTA			
Sedan 4 Dr	8,307	8,391	8,222
89 VOLKSWAGEN JETTA			
Sedan 4 Dr	6,856	6,925	6,787
90 VOLVO			
240 DL Sedan	12,942	13,072	12,815
89 VOLVO			
240 DL Sedan	10,896	11,005	10,787

PRODUCTS/SERVICES

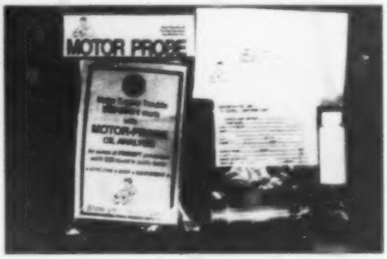
nical data, and testing information. *Beck/Arnley Worldparts Corp.*

Circle 210 on Inquiry Card

IN CONTROL WITH SAM POSEY is an instructional car-handling video distributed by *Road & Track Magazine*. The 65-minute VHS tape by In Control features Indy 500 veteran Sam Posey, who demonstrates how the techniques of a high-stress vehicle maneuver, the advantages of seatbelts, and how the steering and braking systems work together. *In Control.*

Circle 214 on Inquiry Card

OIL ANALYSIS by Motor Probe will identify oil breakdown, fuel and coolant leaks, and engine block problems. After drawing a sample of oil from each vehicle, it will be evaluated on a computerized report which will include recommendations on corrective measures to be taken. With critical problems, an oil analysis expert will call or fax information to you immediately. *Motor Probe.*



Circle 211 on Inquiry Card

THE 712 PUMP SYSTEM is a compact pump and meter system with a liquid crystal display that mounts directly on an above ground storage tank. The 712, manufactured by Fill-Rite, is geared for commercial, government, rental fleets, and small businesses or sites where space and safety considerations require a top-mounted pump. *Fill-Rite.*

Circle 212 on Inquiry Card

FLEETMAX FLEET MAINTENANCE SOFTWARE includes a variety of computerized features such as a vehicle database, preventive maintenance schedules, scheduled and unscheduled work orders, fuel and oil consumption, parts inventory, and personnel records. Fleetmax has been updated to offer larger record sizes, a multi-user version, an improved user interface requiring fewer keystrokes, improved archiving, and an odometer table, among other enhancements. *Roger Creighton Associates.*

Circle 213 on Inquiry Card

CLASSIFIED

V.P., VEHICLE LEASING, SALES & MARKETING

Midsize vehicle fleet management and leasing company seeks person with vehicle leasing industry experience to manage all sales and marketing activities. Compensation open. Send complete resume with compensation history to: **President, Fleetmark, Inc. 6060 Poplar Ave., Suite 442, Memphis, TN 38119-3902.** No phone calls.

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(213) 376-8788

GAS PRICES

UNLEADED GAS
Cost Per Gallon

City	Full-Serve	Self-Serve
Little Rock, AR	144.0¢	113.4¢
Pasadena, CA	147.9	105.6
Colorado Springs, CO	153.9	120.9
Orlando, FL	144.6	121.9
Atlanta, GA	140.0	102.2
Sioux City, IA	124.9	120.2
Emporia, KS	135.0	98.9
Baton Rouge, LA	157.6	115.7
Jackson, MI	161.5	108.4
Kansas City, MO	134.6	103.0
Santa Fe, NM	146.4	122.4
Harrisburg, PA	148.9	119.6
Knoxville, TN	145.9	113.9
Milwaukee, WI	145.7	114.2
Casper, WY	149.9	114.4

The average U.S. full-serve gasoline price for the month of September was 139.5 cents per gallon.
The average U.S. self-serve gasoline price for the month of September was 118.1 cents per gallon.
Survey conducted during the first five working days of September 1991.
Supplied by Runzheimer International, Runzheimer Park, Rochester, WI.